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ABSTRACT

This final report is the outcome of a special education study initiated in March 2000 to review the delivery of educational programs and services for students with special needs in Alberta, Canada. The review process involved consultation with education partners, stakeholders, and service providers who identified issues and made recommendations to strengthen the education system for students with special needs. The report highlights 66 recommendations. Key issues and recommendations for action are identified in seven key areas: accountability, administration, funding, professional development, communication/information, resources, and policy. Specific recommendations include: (1) streamline administrative processes; (2) increase funding for students with severe emotional/behavioral disabilities to the same level as all other students with severe disabilities; (3) ensure early identification of and intervention for students with special needs in education programs; (4) ensure that graduating teachers complete course work in adapting and modifying curriculum; (5) develop a mechanism to determine the students' assistive/adaptive technology and equipment needs; (6) promote clear policy and guidelines for the involvement of parents; and (7) include in an accountability framework monitoring of programming for students who are gifted. Appendices include a glossary of terms, a chronology of events, and a synopsis of suggested solutions. (CR)

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Shaping the Future for Students with Special Needs:

A review of Special Education in Alberta
Final Report, November 2000

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EXECUTIVE SUMMARY

Alberta Learning is committed to meeting the unique education needs of students with special needs. Although Alberta's learning system is recognized as one of the best in the world, striving continuously to improve our education system ensures that we remain responsive to changing needs and changing times.

The Special Education Review was initiated in March 2000, to review the delivery of educational programs and services for students with special needs. The review process involved consultation with education partners, stakeholders and service providers who identified issues and made recommendations to strengthen the education system for students with special needs.

The Special Education Review highlights 66 recommendations. Key issues and recommendations for action are identified in seven key areas:

Accountability

The requirement of school jurisdictions to provide programs and services for students with special needs was raised. One recommendation urged that an accountability mechanism be developed to ensure school authorities are providing programs for students with special needs, measuring student and program outcomes, and determining parent involvement in their children's education.

Administration

A key focus of the review was to look at ways to streamline administrative processes and reduce paperwork for school jurisdictions. For the 2000/2001 school year it was recommended that children with severe disabilities, who met criteria for program unit funding with conditions other than communication, be automatically eligible for severe disabilities funding in Grade 1 without a review of documentation. Other recommendations included extending the March 1 count to include students with severe disabilities in a school authority who were identified after September 30. It was also recommended that the deadline for identifying students be extended to November 30 and that the three-year cycle for reviewing students with severe disabilities, who were approved for funding in 1997/1998, be extended by an additional year.

Funding

The issue of adequacy of funding was not part of this review, therefore, recommendations focused on how funding is allocated to school jurisdictions. These recommendations included changing the current funding model for severe disabilities funding for school jurisdictions and the current model for mild/moderate and severe disabilities funding for designated special education private schools.

Professional Development

The need for all teachers to understand the unique educational needs of students with special needs was highlighted in a number of recommendations. Recommendations included encouraging post-secondary institutions to modify their education programs so that soon-to-be teachers have an awareness and understanding of students with special needs. Other recommendations focused on the development of special training for teachers through Alberta's regional consortia and inservicing of special education resources developed by Alberta Learning.

Communication/Information

The importance of information about the requirements of school jurisdictions, the education system and the processes involved in providing special education programs and services for students with special needs was raised in several recommendations. Parents play an important role in student success and information can help them to make informed choices for their child.

Resources

Several recommendations contained in the review dealt with the importance of resources for educators and parents of students with special needs. Resources developed by Alberta Learning give teachers the tools to be able to provide programs based on the individual needs of students with special needs. In the process of developing resources Alberta Learning consults with teachers and education partners, and field tests resources prior to publication. This ensures that the resource is informative, valuable and has practical applications. Recommendations included the need for resources in the area of identification of students with mild/moderate disabilities and students who are gifted and talented, resources for teaching students with emotional/behavioural disabilities and revising resources currently in use by school authorities and parents.

Policy

A number of recommendations dealt with the need for provincial policy in the areas of early identification and screening, transition planning and cross-government joint service plans for students with special needs. Others dealt with the need to review the current education appeal and review processes and the need to consider the importance of parent involvement in their children's education in Alberta Learning policy and resources.

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INTRODUCTION

Alberta Learning, its education partners, stakeholders and service providers are all committed to meeting the unique needs of students with special needs. Although Alberta's learning system is recognized as one of the best in the world, striving continuously to improve the system ensures that we remain responsive to changing needs and changing times.

On March 15th, 2000, the Minister of Learning, Dr. Lyle Oberg, announced that Alberta Learning would review the delivery of special education programs and services. The review was conducted to discover ways to streamline administrative processes and reduce unnecessary paperwork for school authorities.

Dr. Oberg's announcement came in response to concerns expressed by parents, students, the public, education partners and stakeholders regarding:

- access to and delivery of quality programs and services for students with special needs
- accountability for outcomes for students with special needs
- administrative requirements associated with assessments.

The purpose of this review was to identify issues of concern in special education, identify solutions and provide recommendations for action to the Minister.

Background of Special Education in Alberta

The following information has been grouped into three areas identified by the review team:

- identification of students with special needs
- program development/delivery for students with special needs
- program outcomes/evaluation for students with special needs.

Throughout the report, when reference is made to students who are gifted and talented, and students with mild, moderate and severe disabilities, they are referred to as students with special needs. The principles of special education programming apply to all students with special needs, regardless of the nature of the exceptionality. In some cases, specific references are made to students who are gifted and talented, students with mild/moderate disabilities or students with severe disabilities.

Identification of Students with Special Needs

Students with special needs include students who have mild or moderate or severe disabilities, and students who are gifted and talented. Some

children were born with these special needs, while others have special needs that were identified at a later age.

At age 2 ½, children with severe disabilities, who require additional support and services are eligible for education programming through Alberta Learning Early Childhood Services (ECS) programs across the province. From age 3 ½, children with mild or moderate disabilities are also eligible for early education programs. School authorities are able to access additional funding from Alberta Learning to provide education programming.

Often, parents are the first to recognize the special needs of a child. A qualified individual may conduct a medical or educational assessment to assist educators in determining suitable educational goals, instructional strategies and services to support the student's education program. A variety of appropriate non-discriminatory and multi-dimensional assessment strategies may be conducted, and the results interpreted to parents, teachers and others involved in the student's education.

For school age students, it is the responsibility of school authorities to determine that a student is in need of a special education program.

According to Section 29 (1) of the *School Act*, a school authority may determine that a student is in need of a special education program based on his or her behavioural, communicational, intellectual, learning or physical characteristics, or a combination of these characteristics. Once the authority determines that a student requires a special education program, he or she is entitled to have access to a special education program. (*School Act*, Section 29 (2))

Educational personnel must have the skills to identify the early stages of a student's needs and initiate assessments for the student, as well as provide services and supports for the education program. Parents also play an important role in identifying their children's needs and in providing school authorities with information relevant to their children's education, including information on hearing, vision, developmental progress and medical information.

Program Development/Delivery

Once a student is identified as having specials needs, school authorities must develop and deliver an education program that provides the student with a valuable learning experience. Assessment results, initially used to determine the special needs of the student, are used to assist the teacher in developing and implementing an individualized program plan (IPP). Alberta Learning requires that IPPs be developed for every student identified as having special needs.

As well, to ease transitions for students with special needs, school authorities are required to coordinate the development of a transition plan consistent with the student's IPP. Transitions may be planned for students with special needs for school entry, between Early Childhood Services and Grade 1, between grades, between levels of schooling and upon completion of school.

School administrators are required to identify a key professional teacher at the school level whose primary responsibility is the coordination and monitoring of students' IPPs. As well, school authorities are required to establish a process that involves the student, family, and other professionals and community agencies, as appropriate, in the development of the IPP and transition plan. These people, together with the designated special education school contact, establish measurable goals and objectives to ensure that an appropriate program is developed to meet the student's identified needs.

IPPs are reviewed formally with parents, and where appropriate, with students, on an ongoing basis throughout the year. Results of IPP reviews are used, where necessary, to modify student programs and ensure appropriate educational placements.

Most Alberta students with special needs are placed in regular classrooms in their communities. Whether a student's program is in the classroom or in a small-group setting with students with similar needs, Alberta Learning requires that all children and students with special needs have access to the education programs, supports and services they require. School authorities include plans and strategies for the delivery of coordinated services for children and students in their three-year education plans and results reports.

School authorities are accountable to Alberta Learning to develop, keep current and implement written policies and procedures regarding educating students with special needs.

Parents play an important role in the education of their children. It is the responsibility of parents to become a part of their children's education teams. It is also up to schools to encourage involvement by parents. Open communication between parents and school staff helps ensure that education programming best suited to the needs of students is developed and delivered.

To ensure that services for students with special needs are provided, school authorities must work together with all educational partners, stakeholders, community members and service providers involved. The Student Health Initiative is an example of service providers collaborating

to more effectively deliver services required by students with special needs.

Program Outcomes/Evaluation

To meet the individual programming needs of students with special needs, modifications to the basic curriculum and instructional processes are required. School authorities develop and implement education plans that meet provincial requirements and local needs, while at the same time, focus education on what students need to learn. Planning, assessing, monitoring and reporting further improve the quality of education provided to students with special needs. As well, program outcomes are identified in the student's individualized program plan. School authorities ensure students' IPPs are consistent with Alberta Learning's *Three-Year Plan for Education* by:

- ensuring high standards are set, communicated and achieved
- focusing on what students need to learn
- ensuring students acquire the education they need to prepare for work, further study and citizenship
- using performance measure results to identify areas for improvement.

Alberta Learning provides funding to school authorities to help meet the learning requirements of students with special needs. Funding for students with mild and moderate disabilities, and students who are gifted and talented is currently included in the Basic Instruction funding. Additional funding is available to provide programs and supports for students with severe disabilities. School authorities are required to use a portion of the Basic Instruction funding plus additional funding that is provided for students with severe disabilities to provide programs for students based on their individual needs.

To be eligible for Severe Disabilities funding, school authorities must ensure that students meet the Alberta Learning criteria for Severe Disabilities funding, have additional supports and services in place, and have individualized program plans developed and implemented.

Recent Initiatives

- In March 1999, the Alberta government announced the Student Health Initiative that would aim at improving the access of students with special needs to coordinated health and related support services. The Student Health Initiative would provide $25.6 million annually to help address a range of student health needs so students would be better able to learn at school. Early Childhood Services to Grade 12 students with special health needs, such as speech-language and occupational therapy, would be the primary recipients of the program.

- In July 1999, the Minister of Learning, Dr. Lyle Oberg announced that the "cap" on funding for students with severe emotional/behavioural disabilities would be lifted and funding returned to a "per eligible student" funding.
- In February 2000, the Minister announced that for students with severe disabilities, who move to another school authority after September 30, the new school authority would be eligible for prorated Severe Disabilities funding from March 1. School authorities that previously identified the students would keep the funding to ensure continuity of programs.
- In June 2000, the Minister announced that 14 post-secondary institutions in Alberta will expand programs for educating health care professionals this September. These include spaces for licensed practical nurses, registered nurses, personal support aides, medical radiology technologists (MRT) and speech language pathologists.
- In August 2000, the Minister announced additional funding for children with mild and moderate disabilities who are enrolled in Early Childhood Services programs commencing in the 2000/2001 school year.

Special Education Review

Shaping the Future for Students with Special Needs: A Review of Special Education in Alberta is the result of the collaborative efforts of many partners. The two committees that participated in the review were made up of education partners, stakeholders and service providers. By working together and consulting with members of their organizations, the committees identified issues and developed recommendations.

The Key Partners Steering Committee

The Key Partners Steering Committee, made up of education partners and service providers, was formed to direct the process for the review. With the support of the Stakeholder Advisory Committee, the Key Partners' task was to collaboratively identify key issues in special education and provide recommendations in a report to the Minister.

The terms of reference for the Key Partners Steering Committee included the following functions.

Establish the focus of the review by:

- determining the preliminary issues/focus for the review
- determining the process for validating the issues.

Establish how the review should proceed by:

- identifying how to generate and review the issues and solutions
- identifying how to use the Stakeholder Advisory Committee; e.g., validate issues

- determining how to consult with constituents, members, education partners and service providers.

Prepare a report for the Minister by:

- developing conclusions based on consultation with constituents, members, education partners and service providers
- developing a set of clear recommendations for the Minister's action
- reporting the conclusions and recommendations to the Minister.

The Stakeholder Advisory Committee

Involvement of the Stakeholder Advisory Committee was key to the review. The key function of the Stakeholder Advisory Committee, with direction from the Key Partners Steering Committee, was to provide advice and input on the identified key issues in special education and on the recommendations to be provided in a report to the Minister.

The terms of reference for the Stakeholder Advisory Committee included the following functions:

- review the issues identified by the Key Partners Steering Committee and provide advice and input to validate the issues
- provide advice and input to the Key Partners Steering Committee on how the Stakeholder Advisory Committee will consult with members, stakeholders and service providers
- provide advice and input to the Key Partners Steering Committee on the recommendations for the Minister's action
- review and provide input into the report to the Minister.

Parameters of the Review

The following parameters were identified for the review.

- The review will build on information already obtained through previous reviews and studies, and through correspondence to the department. Through previous work, the barriers are known and the committees can turn their attention to providing recommendations for action.
- The Steering Committee will work to create solutions. The review will involve two committees: the Key Partners Steering Committee for the larger provincial perspective and the Stakeholder Advisory Committee made up of key stakeholders to provide input and advice to the key partners.
- The review will link to the *Alberta Learning Review Committee on Outcomes* work currently underway.
- The review will address the mechanism for getting funding out to school authorities. This includes the distribution and implementation of funding to school authorities. It may include recommendations for

changing funding regulations. Funding adequacy is not a focus of the review.

Principles for the Review

Throughout the review, the following principles were key to the work of the committees:

- promoting collaboration and consultation among parents, schools, school authorities, education partners, stakeholder groups and service providers
- viewing parents as partners in the education of their children
- developing accountability mechanisms that focus on parent involvement, individualized program plans, learner results and completion, and random reviews
- emphasizing, highlighting and communicating the policy, regulations and requirements for school authorities in the *Guide to Education for Students with Special Needs*
- recognizing the needs of students who are gifted and talented
- recognizing the needs of Aboriginal students with special needs.

PROCESS FOR THE REVIEW

The Key Partners Steering Committee first met in April 2000 to develop the purpose of the review. The main purpose was to discover ways to streamline administrative processes and reduce unnecessary paperwork for school authorities. In addition, the Key Partners identified other issues of concern in special education for advice and input from the Stakeholder Advisory Committee.

The Key Partners Steering Committee grouped issues into three areas:

- identification of students with special needs
- program development/delivery
- program outcomes/evaluation.

The initial meeting with the Key Partners Steering Committee and the Stakeholder Advisory Committee resulted in members agreeing to consult with their organizations to further identify issues of concern, and develop and validate possible solutions. Committee members consulted with their members and provided the results of the consultation to the large group.

All Stakeholder Advisory Committee members were invited to provide advice and input to the issues, solutions, recommendations and report.

Some issues are included with other similar issues as they have been identified as a key issue and additional information is needed; e.g., identification and services for Aboriginal students with special needs is included in Early Identification and Intervention, pages 20–22.

Based on the results of the consultation, recommendations were developed and committee members provided feedback and input to each recommendation. The Key Partners Committee analyzed the feedback and further developed the recommendations in a draft report.

The Key Partners Steering and Stakeholder Advisory Committees met in September to review the draft report. During the meeting, the Stakeholder Advisory Committee provided advice and input to the report, and identified the following key issues:

- funding (see pages 12–19) and accountability (see pages 41–42)
- active parent involvement (see pages 32–34)
- fair appeals (see pages 43–45).

The identified issues, solutions, feedback and input from the Key Partners Steering Committee and Stakeholder Advisory Committee form the basis of the recommendations for action in this report. A complete chronology of the process for the review is contained in Appendix B, pages 65–66.

THE REVIEW

The initial purpose of the review was to discover ways to streamline administrative processes and reduce unnecessary paperwork for school authorities. These key findings and recommendations are included in the following section.

Of equal importance were the key issues identified by the Key Partners Steering and Stakeholder Advisory Committees during the consultation phase of the review. The key findings and recommendations are included in the following sections:

- identification of students with special needs
- program development/delivery
- program outcomes/evaluation.

Each issue identified includes the following information:

- issues identified by the Key Partners Steering and Stakeholder Advisory Committee members during their consultation
- suggested solutions provided by individual members of the committees to the issues identified during the consultation. (Some of the suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. A complete synopsis of all solutions provided by committee members is contained in Appendix C, pages 67–79.)
- recommendations for action from the committees to the Minister.

Recommendations to address the issues on an interim basis or those that the committees indicated should be addressed within a short time frame are identified as Short Term. Those recommendations that the committees indicated that will take a longer time to address are identified as Long Term.

To address the issue of streamlining the administrative processes and reducing unnecessary paperwork, the Key Partners Steering Committee reviewed the issues and solutions related to funding of special education provided by all committee members. The Key Partners Steering Committee also reviewed funding models and developed an interim model of funding students with severe disabilities that is included in the following section.

Streamlining Administrative Processes

Administrative Requirements for Severe Disabilities Funding

Issues Identified

The process and administrative requirements for compliance for Severe Disabilities funding is too time consuming and costly. For instance, the administrative requirements for application and approval of Severe Disabilities funding are extensive for school authorities and government. As well, the amount of paperwork required for eligibility for funding needs to be reduced.

Concern was expressed that requirements for repeated assessments reduce the amount of funding available for actual programs and services.

Timelines for approvals for funding are too late in the year. Schools need to have an earlier indication as to whether or not funding will be approved. As well, school authorities require more time to identify students with severe disabilities to Alberta Learning. Students with severe disabilities who were eligible for Program Unit funding in categories other than communication, must be re-approved for funding in Grade 1. There is a need to automatically approve these students who have entered Grade 1.

Issues Identified

Monitoring by Alberta Learning should focus on ensuring students with special needs are being served and programming is appropriate to the needs of students. It is necessary to focus more on monitoring programs for students and student outcomes rather than the up-front monitoring of student documentation. There also needs to be a reduction in the frequency of monitoring students whose condition will not change. It is difficult to complete assessments prior to monitoring.

School authorities may receive prorated Severe Disabilities funding on the March 1 count for students with severe disabilities who transfer to their school authority during the year. Students with severe disabilities who are identified in a school authority during the year should also be eligible for prorated Severe Disabilities funding on the March 1 count.

Concern was expressed that the three-year approval cycle first established in 1997/1998 for funding for students with severe disabilities will end for some students in the 2000/2001 school year. This will significantly increase the administrative requirements and work for jurisdictions to gather and provide information to Alberta Learning for monitoring.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team

member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 67–68.

Some suggestions for streamlining the administrative processes for funding school authorities were offered, including the following:

Suggested Solutions

- *move to an accreditation process for school jurisdictions demonstrating good practice*
- *reduce the frequency of monitoring previously approved students*
- *remove the requirement to reapprove program unit funded students as they enter Grade 1*
- *approve funding in advance, monitor new students only*
- *adjust the September 30 deadline to the end of October or provide prorated funding throughout the year as needs are documented*
- *provide a clear and concise format for schools to follow, including specifics on what documentation will be accepted, what is meant by "recent," what reports are required by Alberta Learning (keeping in mind the need to streamline the process and reduce administrative paperwork)*
- *have documentation and individualized program plans submitted to Alberta Learning at the same time that the coding information is submitted; i.e., with September 30th submission, for earlier monitoring*
- *explore the possibility of providing conditional approval based on early assessment and documentation, followed by additional supporting information as required.*

Recommendations — Administrative Requirements for Severe Disabilities Funding

Recommendations

1. Short Term 1

That Alberta Learning implement the following immediately for the 2000/2001 school year.

- **That Alberta Learning provide copies to all school authorities of the new *Handbook for the Identification and Review of Students with Severe Disabilities* developed with the College of Alberta School Superintendents.**
- **That Early Childhood Services children who meet eligibility criteria for conditions other than communication under Program Unit Funding, be automatically eligible for Severe Disabilities funding in Grade 1 without review of documentation.**
- **That Alberta Learning extend the March 1 count to all eligible students with severe disabilities in a school authority who were identified after September 30.**

Recommendations (cont'd)

- **That the deadline for school authorities to identify students with severe disabilities, who were in attendance on September 30, be extended to November 30 to allow school authorities additional time to identify all students with severe disabilities.**
- **That Alberta Learning extend by one year the three-year cycle for monitoring all previously identified students with severe disabilities and include only new students for monitoring.**
- **That Alberta Learning, in collaboration with education partners, stakeholder groups and service providers, clarify policy, procedures and regulations that have created areas of confusion to parents and schools, and communicate this to parents, trustees, MLAs and school authorities.**

The above recommendations were developed to address the issue of streamlining administrative processes and reducing unnecessary paperwork for school authorities on a short-term basis.

The Key Partners Steering Committee concluded that to address the long-term issues for streamlining administrative processes, they would need to review the current funding model for special education.

One of the parameters for the review was that the recommendations developed by the committees would need to link with the work of the Review Committee on Outcomes currently underway. The Review Committee on Outcomes is the first phase in the development of a larger, outcomes-based blueprint to make the education system more flexible and responsive to learners. One of the components of that review is a review of the funding framework for all education. The following recommendations are interim measures to the overall review of funding.

Funding for School Jurisdictions and Private Schools

Funding for School Jurisdictions

Issues Identified

Funding for students with special needs should not be an incentive or disincentive for identifying students with special needs.

Issues Identified

There is a perception that there is no funding for students with mild/moderate disabilities or students who are gifted and talented. The funding mechanism for these students must be accountable and transparent.

As well, children in Early Childhood Services who qualify under Program Unit Funding in categories other than communication, should not have to requalify for Severe Disabilities funding.

Issues Identified (cont'd)

While adequacy of funding was beyond the scope of this review, committee members indicated that in their consultation, this was an area that required further work with education partners to determine if levels of funding are adequate and directly related to student and program outcomes. The committees frequently heard that funding for students with special needs is inadequate and needs to be increased. The adequacy of funding for programming has not been addressed in the review, but committee members have identified recommendations for increases to current funding levels in specific areas.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 68–70.

Suggested Solutions

A number of models for funding school authorities were suggested, including the following:

- *base Severe Disabilities funding on established incidences and reasonable funding increases, and allow jurisdictions to determine eligibility of students for programming — monitoring by Alberta Learning should focus on compliance, ensuring students are being served and programming is appropriate to their needs*
- *earmark funding for students with mild/moderate disabilities and students who are gifted and talented, and provide as a separate grant to school jurisdictions*
- *fund students who are gifted and talented as a separate category from other students with special needs*
- *fund students who are gifted and talented with funding for all students with special needs*
- *consider a population-based funding approach based on total student enrollment, incidence and key socio-economic characteristics of the student population*
- *provide one source of funding to school jurisdictions for all students*
- *establish a funding approach which would soften the transition from Program Unit Funding to Severe Disabilities funding by gradually reducing funding levels to Grade 3 to have funding levels in line from Grade 4 on*
- *consider modifications to funding in which allocations for mild, moderate and severe disabilities are established on a scale to better reflect student needs within each category.*
- *enable school jurisdictions to submit a profile to Alberta Learning with the program needs of the student outlined and have funding provided, rather than having funding provided and then trying to fit the program to the dollars allocated*

Suggested Solutions (cont'd)

- *provide support for "full-cost recovery" for substantiated financial needs identified and supported by jurisdictional documentation for those students that fit into this unique category*
- *explore the creation of a third funding category for Grade 1–12 students who have severe moderate disabilities*
- *create a separate moderate funding category in a student's name to ensure that students with moderate disabilities can access appropriate services*
- *identify the nature of the therapeutic needs of the student and then assign a dollar allowance to the student*
- *change current Severe Disabilities funding for a mechanism that reflects program needs of the jurisdiction, including the incidence of students with profound disabilities and a jurisdiction's demographics.*

What We Did

The Key Partners Steering Committee recognized that funding for programming for students with special needs has come a long way since the funding framework was developed in 1995/1996. Students with severe disabilities are being identified and the levels of programming and services provided have increased significantly since the introduction of Severe Disabilities funding.

What We Did

The Key Partners Steering Committee developed and reviewed a number of funding models and concluded that as an interim to the work of the Review Committee on Outcomes, revisions to the current funding model be proposed for the 2001/2002 school year.

Funding for Students with Mild/Moderate Disabilities and Students who are Gifted and Talented

- Funding for students with mild/moderate disabilities and students who are gifted and talented should continue to be provided in the Basic Instruction funding for every student in a school jurisdiction.
- This funding should be highlighted in Alberta Learning documents, and it should be emphasized that the funding is currently seen as a minimal amount that school jurisdictions are expected to pool to provide programming for students with mild and moderate disabilities, and students who are gifted and talented.
- The committee also heard that funding is insufficient to assist with the transition in programming from Early Childhood Services to Grade 1, and recommends that the rate of funding included in the Basic Instruction funding be increased to accommodate the transition.

Students with Severe Disabilities

- The current funding model for students with severe disabilities should be changed.

- Alberta Learning, in collaboration with school jurisdictions, should establish an individual jurisdiction profile that includes historical data on students with severe disabilities served plus the pattern of growth over the past five years of students with severe disabilities. Based on the pattern of growth over the past five years, projections for funding additional students would be included.
- For school jurisdictions whose profile changes significantly, Alberta Learning, in collaboration with the jurisdiction, would review the profile and adjust funding either way.
- During the 2000/2001 school year, Alberta Learning should phase-in the model, as appropriate, with school jurisdictions to learn how well this model of funding works prior to full implementation.
- Additional funding should be provided to increase the rate of funding for students with severe emotional/behavioural disabilities to the same level for all students with severe disabilities.

Changes to the current model of funding outlined above would address the following concerns.

What We Did (cont'd)

- There is a need to eliminate the cumbersome administrative requirements for funding based on individual student eligibility — *school jurisdictions would be required to identify students and assess for programming purposes only, to meet students' learning needs. Monitoring by Alberta Learning would be based on student and program outcomes, and ensure that supports and services are in place for students, rather than up-front monitoring for individual eligibility for funding. The model also reinforces that all special education funding should be pooled and allocated based on the individual needs of a child.*

- There is a need to consider a model of funding across a child's life pathway which focuses on what children need and the provision of resources to meet their needs — *the proposed interim funding model for students with severe disabilities will allow for smoother transitions between ECS and Grade 1, from grade to grade, level to level and high school to post-secondary education or the work force.*

- There is a need to develop a review process for the monitoring of special education which would involve a model of collaboration, consultation and accountability, and provide continuous feedback for improvement of programs and services for students with special needs instead of up-front monitoring for student eligibility — *by eliminating the extensive up-front administrative requirements and monitoring for eligibility, Alberta Learning staff could focus on a collaborative and consultative model for determining student and program outcomes, and assisting jurisdictions with identifying resources and strategies for programming.*

Recommendations

Recommendations — Funding for School Jurisdictions

2. Short Term 1
That for the 2000/2001 school year, funding for students with severe emotional/behavioural disabilities be increased to the same level as for all other students with severe disabilities.

3. Short Term 2
That for the 2000/2001 school year, funding for students with mild and moderate disabilities, and students who are gifted and talented continue to be included in the Basic Instruction funding provided for all students in a school jurisdiction. The level of funding available in the Basic Instruction funding for students with mild and moderate disabilities, and students who are gifted and talented should be clearly identified in Alberta Learning documents as a minimum amount school jurisdictions are expected to pool for programming for students. See also Recommendations — Accountability — Short Term 1 and Long Term 1, page 42.

4. Long Term 1
That for the 2001/2002 school year, the level of funding included in the Basic Instruction funding for students with mild and moderate disabilities, and students who are gifted and talented be increased to accommodate the transition from ECS to Grade 1.

5. Long Term 2
That for the 2001/2002 school year, for students with severe disabilities in school jurisdictions, funding be provided based on a school jurisdiction profile. The profile would be based on historical data on students with severe disabilities served plus the pattern of growth over the past five years of students with severe disabilities in the jurisdiction. The profile would also include projections for growth of the number of students with severe disabilities.

That Alberta Learning collaborate and consult with all school jurisdictions over the next six months to establish their profile for funding students with severe disabilities and phase in the proposed model of funding across school jurisdictions as appropriate.

6. Long Term 3
That the issues and suggested solutions for alternative funding models identified by the Special Education Review Team be provided to the Review Committee on Outcomes for consideration in the review of the funding framework.

Funding for Private Schools

Funding for students with mild and moderate disabilities, and students who are gifted and talented is included in the Basic Instruction funding provided for all students in a regular private school. Funding for students with severe disabilities is provided based on the number of eligible students with severe disabilities.

What We Did

What We Did

The Key Partners Steering Committee reviewed funding models for private schools. The committee reviewed the current model and the proposed alternative model for school jurisdictions and its application to regular private schools.

Students with Mild/Moderate Disabilities and Students Who are Gifted and Talented

- Alberta Learning should continue to include funding for students with mild/moderate disabilities, and students who are gifted and talented in the Basic Instruction funding for all students in regular private schools.

Students with Severe Disabilities

- Alberta Learning should continue to provide funding for students with severe disabilities based on individual student eligibility. This would enable regular private schools with varying numbers of students with severe disabilities to continue to identify individual eligible students.

Recommendations — Funding for Private Schools

Recommendations

7. Short Term 1
That Alberta Learning continue to fund regular private schools using the current funding model for students with special needs.

Funding for Designated Special Education Private Schools

Issues Identified

The present system of funding is cumbersome and not conducive to promoting cooperation among public and private schools. Authorities do not have consistent criteria for determining the mild and moderate disabilities of a student, and it is felt that designated special education private schools are serving more students with mild disabilities than moderate disabilities and receiving a higher rate of funding.

Continuation of the current model may diminish working relationships between school jurisdictions, designated special education private schools and Alberta Learning.

School jurisdictions are not pleased that they must transfer funding from programs for resident students with special needs while not receiving any supplemental funding.

Concern has been expressed by school jurisdictions and designated special education private schools about the increased amount of administration required to track and administer funding.

Parents have expressed concern about being able to exercise their right to choice as the process is unclear.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 68–70.

Suggested Solutions

Fund students with mild, moderate and severe disabilities directly to designated special education private schools.

Recognize and alleviate the burden on school jurisdictions to transfer funding for students with mild and moderate disabilities to designated special education private schools.

What We Did

The current model of funding students with special needs in designated special education private schools was reviewed and the following recommendations developed.

What We Did

Students with Mild and Moderate Disabilities

- For students directed by a school jurisdiction, Basic Instruction funding should be provided directly to the private school and the school jurisdiction should provide any additional funding required for the full cost of the program.
- For students not directed by a school jurisdiction, Basic Instruction funding, and funding for students with mild and moderate disabilities in designated special education private schools should be provided directly to the school at no cost to the resident school jurisdiction.
- The expectation would be that parents continue to contact the resident school jurisdiction prior to making a decision to place their children in designated special education private schools.

Students with Severe Disabilities

- For students not directed by a school jurisdiction, Basic Instruction and Severe Disabilities funding for students with severe disabilities in

designated special education private schools should be provided directly to the school based on eligibility criteria.

- For students directed by a school jurisdiction, that Basic Instruction and Severe Disabilities funding should be provided directly and the school jurisdiction provide any additional funding required for the full cost of the program.

Recommendations — Funding for Designated Special Education Private Schools

Recommendations

8. Short Term 1
That Alberta Learning change the current model to provide funding for students with mild and moderate disabilities directly to designated special education private schools at no cost to the resident school jurisdiction.

9. Short Term 2
That Alberta Learning change the current model to provide funding for students with severe disabilities directly to designated special education private schools.

Identification of Students with Special Needs

Early Identification and Intervention

Alberta Learning requires that students be screened for early identification of special needs. Early identification of students with special needs for appropriate educational programming occurs at all ages. Early Childhood Services (ECS) children are often identified at birth as requiring additional support and services, and are eligible at 2 ½ years of age for education programming through ECS programs across the province.

Issues Identified

Early identification and intervention are fundamental to educating students with special needs. To create a consistent process across the province, early identification of children with special needs must be universally accepted. There is a need to look at the identification and delivery of programming for Aboriginal students with special needs. Some Aboriginal students with special needs are being transported long distances to schools due to cutbacks in funding.

Some committee members indicated that to avoid having children being reassessed at a number of different points, children and parents should have a single point of entry. Others said there is a need for safeguards on student information to protect children.

Issues Identified

In addition, early identification and intervention are necessary for all students in their education programs. Education personnel must be responsive to parental concerns about their children's difficulties. Education personnel must also have the skills to identify student's needs at an early state, initiate assessments, and provide services and supports for these students, including individualized program plans (IPPs). Parents must also be involved in the identification of their children's needs and the development of IPPs.

When many agencies are involved with a child, information and services can be fragmented. Parents need to receive and understand the resources and services available to identify children from birth. Some provinces have implemented a portfolio system for parents to maintain and provide to school staff upon their children's school entry.

A more proactive approach needs to be established. This may involve providing enhanced screening and reinstating health screening for children of at-risk families. To improve the process of early identification and intervention for children, consistency and effective collaboration by

related ministries is required. Criteria for identifying students with special needs should be reviewed to promote early identification and intervention programs.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 71.

Suggested Solutions

Establish criteria to address the needs of students from a broader perspective, which would afford opportunity for earlier intervention, create flexibility for those assessing students and reduce repeated assessments.

Develop consistent identification processes across the province.

Approach other agencies and departments involved with children with the goal of developing and implementing comprehensive early identification processes.

Recommendations — Early Identification and Intervention

Recommendations

10. Short Term 1
That Alberta Learning emphasize, communicate and highlight the requirements in the *Guide to Education for Students with Special Needs* for school authorities to develop and implement policy to ensure the early identification and intervention of students with special needs in education programs. See also Recommendations — Accountability — Short Term 1, page 42.

11. Short Term 2
That education partners, stakeholders and service providers collaborate to address the issues in the Special Education and Native Policy reviews for the identification, programming and services for Aboriginal students with special needs.

12. Long Term 1
That the Alberta Government develop policy to support the early identification and screening of children, and develop a provincial early identification/screening program.

The review team recommends that Alberta Health and Wellness take the lead in partnership with other ministries and service providers.

Recommendations (cont'd)

That the early identification/screening program recommended above be piloted prior to full implementation.

13. Long Term 2
That service providers, stakeholders and education partners work collaboratively to enable parents of newborns to have pertinent information on accessing resources and supports for children.

Assessment of Students

Alberta Learning requires school authorities to obtain parents' informed consent for referral for assessments. Alberta Learning also requires that assessments be conducted to determine suitable education goals, instructional strategies and services in support of the programming and learning needs of students. School authorities are also required to use a variety of appropriate assessment strategies which are non-discriminatory and multi-dimensional to assess students and to use the results of assessments provided by specialists, school staff and/or parents to plan programming to meet the needs of students. School authorities are also required to ensure that qualified individuals conduct assessments and interpret the assessment results and any program planning recommendations to parents, teachers and others involved in the student's program.

Issues Identified

Students with special needs need to be identified using procedures other than specific labels or categories. Some students may have complex needs that cannot be identified using a single label. The practice of labeling students tends to focus on deficits while ignoring strengths, creating an unbalanced picture of the student. As well, those not well-versed in the field may misunderstand specific labels. For instance, students with mild/moderate disabilities may require as extensive supports and services as students with severe disabilities.

Issues Identified

There is a need for consistency across the province — both in identifying and assessing students with special needs. More functional testing should be considered. Better coordination of assessment information can help prevent duplicating assessments. Some committee members indicated that students with mild and moderate disabilities are not being assessed or provided programs. When assessments are required, they should be conducted for the purpose of providing information for teaching and learning, and for developing appropriate education programs and individualized program plans — not to code students or procure funding.

Once it is determined that a student requires special education services, those services should continue to be provided without the requirement of numerous reassessments when it is obvious to those working with the student that the services are still required.

Issues Identified (cont'd)

School authorities and parents face a number of barriers in accessing assessments for students with special needs. Besides limited access to qualified people to conduct assessments, school authorities and parents often feel there is an overemphasis on certain types of assessments. As well, waiting lists for assessment services can collide with monitoring submissions and renewal deadlines.

Other barriers include third-party billing for reports, the reluctance of medical personnel to provide diagnostic reports for coding purposes, the reluctance of some schools to respond to parent requests for assessments and the reluctance of some parents to have their children assessed by professionals. As well, rural school authorities often have difficulty accessing necessary professional resources on time and in a cost-effective manner.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 71–72.

Suggested Solutions

Revisions to criteria are needed to address the needs of students from a broader perspective. Students should be assessed based on their individual needs. Alberta Learning should develop standards and distribute model practices for the identification and assessment of students with special needs that are linked to programming and individualized program plans.

A process needs to be developed that allows for individuals to be identified as no longer requiring programming and that prevents undue assessments while acknowledging growth.

Recommendations — Assessment of Students

Recommendations

14. Short Term 1
That Alberta Learning assist school authorities in interpreting the current criteria and definitions of severe disabling conditions through the release of the *Handbook for the Identification and Review of Students with Severe Disabilities* developed in collaboration with the College of Alberta School Superintendents.

15. Short Term 2
That the collaborative work between the College of Alberta School Superintendents and Alberta Learning be extended, and include other partners and stakeholders to develop a handbook for the

Recommendations (cont'd)

identification of students with mild and moderate disabilities, including a section on students who are gifted and talented.

16. Short Term 3
That Alberta Learning, in collaboration with education partners, stakeholders and service providers, review the present criteria for identification and coding of students with special needs, and develop standards for identification based on the programming and learning needs of students with special needs.

17. Short Term 4
That Alberta Learning take the following steps to ensure school authorities have the information and assistance necessary to identify all students with special needs:

- **clarify and develop standard definitions based on the programming and learning needs of students with special needs (See also Short Term 3 above.)**
- **assist school authorities to identify students with special needs for education programming**
- **with school authorities, emphasize, highlight and communicate the requirements in the *Guide to Education for Students with Special Needs* for the assessment of students with special needs. See also Recommendations — Accountability — Short Term 1, page 42.**

18. Short Term 5
That Alberta Learning include in its review of sensory multihandicapped services, the recommendation of the Special Education Review committees to consider expanding the mandate to provide assessment, consultation and inservice in support of all funded students with severe disabilities.

19. Long Term 1
That Alberta Learning, in collaboration with education partners and service providers, develop policy and provide direction on the use of assessment criteria for educational programming purposes to promote appropriate assessment practices for students with special needs.

Program Development/Delivery

Professional Development

Issues Identified

Alberta's teachers, teacher assistants, service providers and others who work with students with special needs must have the appropriate education and professional development. At the university levels, strategies for working with students with special needs must be infused throughout the education program. To develop the skills required to implement strategies, teachers require courses over a period of time. Teachers need to know how to teach in an inclusive classroom. Alternative delivery modes for providing preservice and inservice should be investigated.

Issues Identified

Successful programming for students with special needs must include education, professional development opportunities and support for all those working with students. Teachers are limited in the number of workshops they can attend, so strategies for working with students with special needs should be incorporated into regular course workshops. There is a need for regional consortia to expand courses in special education for teachers and support staff. More opportunities for professional development should be offered.

Each school should have a key teacher with special education expertise to deal with and coordinate special education. Schools need more educators with knowledge of special education, as well as a greater capacity in specialized areas.

Inservice on strategies for working with students with special needs must be provided to parents and teacher assistants.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 72–73.

Suggested Solutions

Post-secondary institutions should mandate and infuse course work in special education into courses and practicums in education programs. More professional development could be offered during the summer so teachers can access it; e.g., Inclusive Education Summer Institute.

Emphasize the need for teachers with special education expertise at the school and central office levels. Develop creative solutions including alternatives to traditional settings, such as internet/video conferencing for peer interaction.

Recommendations — Professional Development

Recommendations

20. Short Term 1
That the Special Programs Branch of Alberta Learning continue to collaborate with the Alberta Teachers' Association Special Education Council in the annual Special Education Conference and continue to liaise with other Alberta Teachers' Association Councils.

21. Short Term 2
The review team recommends that regional consortia take the lead in collaboration with education partners, stakeholders and service providers to identify professional development inservice areas of need for educators, parents and service providers of students with special needs.

22. Short Term 3
The review team recommends that regional consortia work with Alberta Learning, education providers and stakeholders to enhance the education and professional development programs provided by the consortia to include special education information in other curriculum initiatives provided by the consortia.

23. Long Term 1
That post-secondary institutions ensure that all graduating teachers successfully complete coursework in adapting and modifying curriculum, developing individualized program plans, and implementing appropriate instructional practice and strategies to promote classroom environments conducive to meeting the needs of students with special needs, as well as course work in providing programs for students with special needs.

24. Long Term 2
That post-secondary institutions work with education partners to develop alternative ways of providing preservice and inservice courses on special education; e.g., video conferencing.

Availability of Qualified Staff and Service Providers

Issues Identified

Alberta is experiencing a shortage of qualified staff and service providers to meet service-level expectations for delivering programs for students with special needs. The shortage includes speech language pathologists, occupational therapists, physiotherapists and other trained professionals. There is a need to increase expertise, the number of people with specialized knowledge and to have more extensive support available from expertise centres.

Issues Identified

As well, there is a serious shortage of qualified and trained interpreters and transliterators working with the deaf. There is a need for professionals fluent in sign language. Doctors, speech language pathologists, occupational therapists, special education consultants, social workers and other professionals who work with students who are deaf, need specialized education. At present, there are no human resources available within Alberta Learning to provide leadership in the area of students with visual impairments and blindness.

More funding needs to be allocated for professionals to cover school needs, or for schools to cover services for students. Educational assistants are required for schools to assist in delivering programs, and more professionals are needed to act as liaisons between home and school.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 73.

Suggested Solutions

Provide a mechanism to increase the number of graduates in areas where there are shortages. Ensure a higher level of cooperation and commitment by all service providers. Provide leadership and standard of service criteria in the area of blindness and visual impairment, and increase education for those working with the deaf.

Recommendations — Availability of Qualified Staff and Service Providers

Recommendations

25. Short Term 1
That Alberta Learning continue its work with post-secondary institutions to add additional spaces in programs where there is a shortage of professionals; e.g., recent announcement on additional spaces for speech language pathologists.

26. Long Term 1
That Alberta Learning, in collaboration with other government ministries, education partners, stakeholders and service providers, continue to identify and track those areas where there is a shortage of professionals.

Resources

Issues Identified

Issues Identified

Teachers and parents require resources to provide appropriate programs to support student success regardless of where they live in the province. The development of teacher resource manuals and resources for parents of students with special needs by Alberta Learning has been exemplary. However, additional resources for students with emotional/behavioural disabilities and inclusive education are required. Concern was expressed that the movement of resource development out of the Special Programs Branch will reduce the department's priority for work in this area.

Implementation of the excellent teacher resources needs to continue and be increased. To help students with special needs achieve success, support and services need to be available in the classroom.

School authorities often have difficulty contacting Alberta Learning as they do not have a comprehensive list of staff with expertise in the area of special education.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 73–74.

Suggested Solutions

Continue to work with partners to develop resources and provide inservice opportunities for the resources. Consider retaining resource development in the Special Programs Branch. Provide lists of Alberta Learning personnel in the area of special education.

Recommendations — Resources

Recommendations

27. Short Term 1

That Alberta Learning develop a brochure to distribute to educators and parents upon the release of the manual *Teaching Students with Emotional Disorders and/or Mental Illnesses*.

28. Short Term 2

That Alberta Learning revise the *Guide to Education for Students with Special Needs* to emphasize, communicate and highlight the requirements of school authorities in, but not limited to, the following areas:

- **for schools and school authorities to work directly with parents and other service providers in the identification of students with special needs**
- **for identifying students with special needs**
- **for providing inservice opportunities for educators providing programs for students with special needs**
- **for including parents in placement and program decisions, and in the development and implementation of individualized program plans**
- **for developing and implementing individualized program plans for all students with special needs**
- **for identifying a key professional teacher with special education expertise at each school to coordinate programs for students with special needs**
- **for coordinating the delivery of services for children**
- **for providing parents of students with special needs with policies and procedures, including those procedures related to appeals and reviews.**

29. Short Term 3

That Alberta Learning revise the parent handbook *Partners During Changing Times* to highlight and communicate information for parents in the following areas, as well as other areas of special education:

- **polices, procedures and individualized program plans for students with special needs**
- **information for parents on how to access services for students with special needs**
- **transition planning for students with special needs at all levels**

- **appeal processes at the local level and review processes at the ministerial level**
- **information on working together with the school and other service providers.**

Recommendations (cont'd)

30. Short Term 4
That Alberta Learning provide school authorities with the names and telephone numbers of resource people within the department to answer questions and concerns from school authorities on students with special needs.

31. Short Term 5
That Alberta Learning, in collaboration with education partners, stakeholders and service providers, place a high priority on ensuring that special education resources continue to be developed for teachers and parents of students with special needs.

32. Short Term 6
That Alberta Learning place a high priority on ensuring that the special education resources developed are inserviced through a series of workshops for educators.

33. Long Term 1
That Alberta Learning, in collaboration with education partners, develop a mechanism to determine the results and impact that resources developed by Alberta Learning have on programming for students with special needs.

Adaptive Technology

Issues Identified

Parents and students are often unable to access necessary equipment and adaptive technology to meet the needs of students with special needs. In addition, school authorities are unable to acquire equipment needed for students with special needs within the current system of funding.

Issues Identified

Adaptive technology is a critical element for blind or visually impaired students, as it allows these students reasonable access to information. Yet there are few readily available resources in Alberta to assist students in acquiring and implementing adaptive technology.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point

of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 74.

Suggested Solutions

Alberta Learning should be responsible for providing protocols for acquiring adaptive technology and equipment. A clear definition of requirements and a central service are needed to better meet the needs of students. A clearing house of equipment that can be accessed from key areas across the province should be developed as part of the mandate of the Alberta Learning Special Programs Branch or the Materials Resource Centre for the Visually Impaired.

Recommendations —Adaptive Technology

Recommendations

34. Short Term 1
That Alberta Learning collaborate with education partners, service providers and stakeholders to identify a repository/clearing house of services for acquiring technology for students with special needs.

35. Long Term 1
That Alberta Learning take the lead in collaboration with education partners and service providers to develop a mechanism to determine the assistive/adaptive technology and equipment needs of students with special needs, and create a plan to coordinate the provision of technology and equipment to students with special needs.

Individualized Program Plans (IPPs)

Issues Identified

Individualized program plans (IPPs) must be living, cumulative documents with measurable outcomes that can respond and adapt to the learning needs of the student. IPPs are the basis on which special education is delivered. Students' strengths, strategies for addressing those strengths and areas of growth need to be included in students' IPPs. For all students with special needs, expectations for their IPPs need to be clarified.

Issues Identified

Sometimes, parents are not aware that a child has an IPP in place and what it means. IPPs are to be developed in collaboration with parents and agreed upon by the parent. IPPs must be communicated directly to parents in a timely manner.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 74–75.

Suggested Solutions

Alberta Learning should clarify expectations for developing IPPs for students with special needs. Programming strategies should be provided that are flexible, evaluated annually and chosen according to the individual needs of the student at that time. Parents should be involved in the development and implementation of their children's IPPs. The focus should be on lesson planning and adaptive assessment based on regular learning requirements.

Some teachers would like to see a common IPP. Teachers must have a better understanding of how to use the IPP as a tool to enhance the student's classroom experience.

Involve other services providers early in the development of the IPP to ensure a collaborative approach. Use the IPP as an outcome measure to demonstrate success for the student with special needs.

Recommendations — Individualized Program Plans

Recommendations

36. Short Term 1
That Alberta Learning continue to update information on the development of individualized program plans in the *Programming for Students with Special Needs* series, Book 3: *Individualized Program Plans* and develop an electronic database with standards for individualized program plans for use by school authorities.

37. Short Term 2
That Alberta Learning and school authorities communicate, highlight and emphasize the requirements in the *Guide to Education for Students with Special Needs* for the development and implementation of individualized program plans. See also Recommendations — Accountability — Short Term 1, page 42.

Parent Involvement

Issues Identified

Many parents of students with special needs do not have an equal choice in placement and program decisions affecting their children. Parental choice for students without special needs is more respected and accommodated than parental choice for students with special needs.

These parents need to have their voices and choices respected. They need to have choice and information on options.

Issues Identified

When parents choose to educate their children in public education, they should have a right to select their children's placement, whether in a segregated or inclusive environment. Placement and program decisions must be in the best interest of the individual needs of the child.

Parents need to be involved in planning for their children and want to be routinely involved in the selection of teacher assistants for their children.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 75.

Suggested Solutions

Include parents in planning for their children.

Consider having teams of parents, members of the community, and education and service providers available to explain program options to new parents of children with special needs.

An accountability process should be in place to ensure that parents have the opportunity for active involvement in the education of their children with special needs.

Recommendations — Parent Involvement

Recommendations

38. Short Term 1
That Alberta Learning communicate, highlight and emphasize the requirements in the *Guide to Education for Students with Special Needs* for school authorities to develop clear policy and guidelines for the involvement of parents in identification, development of individualized program plans and program delivery for students with special needs. See also Recommendations — Accountability — Short Term 1, page 42.

39. Short Term 2
That Alberta Learning communicate, highlight and emphasize in the current review of the *Special Education* and *Educational Placement of Students with Special Needs* policies and in the *Guide to Education for Students with Special Needs*, that opportunities be provided for parents of students with special needs to be involved as partners in their children's education.

Recommendations (cont'd)

40. Long Term 1
That Alberta Learning, in collaboration with other education partners and stakeholders, develop an accountability mechanism for parent involvement in placement and program decisions. See also Recommendations — Accountability — Long Term 1, page 42.

Gifted and Talented

Issues Identified

Students who are gifted and talented need recognition by all that they have legitimate special needs. Concern was expressed that these students are under-identified and not adequately assessed. A screening process is required for identifying students who are gifted and talented, and early identification and intervention is an integral component to their success.

Issues Identified

Accountability for the development and implementation of programs for students who are gifted and talented, and resources available to them are inadequate. Because of limited resources for providing programming for students with mild/moderate and severe special needs, the need for assessments and programming for students who are gifted and talented tends to be overlooked.

A range of programming choices is required to provide meaningful and challenging programming for students who are gifted and talented. Cost-effective strategies, such as curriculum compacting, acceleration and ability grouping, can be used in both inclusive and congregated settings.

Students who are gifted and talented have much in common with other students with special needs as their unique differences single them out from their same-aged classmates in the regular classroom. In the inclusive classroom, students who are gifted and talented can be isolated academically or socially.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 75–76.

Recognize and address the needs of students who are gifted and talented through differentiated programming to support their success.

Suggested Solutions

The need for intellectual peer interaction is a factor in the healthy social and emotional development of students who are gifted and talented and should be respected by school authorities.

Monitor and ensure school authorities are identifying and providing programming for students who are gifted and talented.

Recommendations

Recommendations — Gifted and Talented

41. Short Term 1
That Alberta Learning include in an accountability framework monitoring of programming for students who are gifted and talented. See also Recommendations — Accountability — Long Term 1, page 42.

42. Short Term 2
That Alberta Learning develop a pamphlet for school authorities and parents on the funding, policy and resources available for the delivery of programs for students who are gifted and talented.

43. Short Term 3
That the collaborative work between the College of Alberta School Superintendents and Alberta Learning be extended to include other partners and stakeholders to develop a handbook for the identification of students with mild and moderate disabilities, including a section on students who are gifted and talented. See also Recommendations — Assessment of Students — Short Term 2, page 23.

44. Long Term 1
That Alberta Learning, in collaboration with Alberta School Boards Association and College of Alberta School Superintendents, assist school authorities to develop and implement policies for providing programs for students who are gifted and talented.

Coordination of Services

Alberta Learning requires school authorities to take an active role in initiating or participating in working together with other members of the community to ensure children and students with special needs have access to the services they require. The delivery of programs for students with special needs should involve all education partners, stakeholders and service providers working with the student. School authorities are required to include plans and strategies for the delivery of coordinated services for children and students in their three-year education plans and results reports.

Issues Identified

The Student Health Initiative has enhanced the foundation for inter-jurisdictional coordination. Each partnership has come to agreement on what is best, but there are not enough personnel to provide services and little overlap between systems in practical application.

Services for students with special needs are not being provided in an integrated system of program delivery.

Issues Identified

Everyone must commit to the child's life pathway from the time a child is born. Better coordination among various service providers is needed to ensure children and families get the services they need. Those involved must work together to support children with special needs. It is necessary to look at what the child needs and provide it. To do so, a continuum of services for children with special needs must be coordinated and provided. Some indicate that parents of children with special needs require "one-stop shopping" while others say that information on students with special needs should be safeguarded to protect the student.

Parent involvement in identifying and managing services for their children needs to be examined. As well, it is necessary to examine the development of joint-service plans to integrate the services and supports provided to students with special needs. The plan must be adopted and accepted by all service providers, and funds provided to ensure it is carried out.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 76–77.

Consider the use of the individualized program plan for a multi-disciplinary, inter-jurisdictional overall plan.

Develop a mechanism to create a comprehensive student record and allow student information to be shared.

Suggested Solutions

Develop protocols for working together in the school environment and for a contact with special education expertise at each school to coordinate services for students with special needs.

Consider having teams of parents, members of the community, and education and service providers available to explain programming options to new parents of children with special needs.

Recommendations — Coordination of Services

45. Long Term 1

That Alberta Learning, in collaboration with the partners of the Student Health Initiative, monitor and study the work of the Student Health Initiative in the following areas.

- **Has the initiative improved coordinated services for students with special needs?**
- **Has the initiative improved the delivery of programs and services for students with special needs?**
- **What are some of the key elements that have made the partnerships work?**

Recommendations

Based on the study of the Student Health Initiative, that Alberta Learning develop a guide for school authorities to assist them in developing collaborative models in other areas.

46. Long Term 2

That the Alberta Government explore the use of the individualized program plan as a mechanism for implementation of a joint-service plan for students with special needs that reflects the integration of supports and services.

The review team recommends that the cooperating ministries of the Alberta Children's Initiative take the lead in collaboration with education partners, service providers and stakeholders.

Transition Planning

Alberta Learning requires that transitions are planned for students with special needs for school entry, between levels of schooling and upon school completion. School authorities are required to coordinate the development of a transition plan consistent with the student's individualized program plan, and establish and initiate a process that involves the student, family, other professionals and community agencies as appropriate.

Transition may occur between grades, schools, school authorities and post-secondary education or the workforce. The transition plan is a requirement of a student's individualized program plan.

Issues Identified

Transition planning for students with special needs is not working well for many children and families. A life-plan system is essential to provide supports and services for families from birth, from grade to grade, level to level, and high school to post-secondary education or the workforce.

Conversely, others indicate that parents are responsible for the child's life plan, not educators and a coordinated system is essential. Presently, the level of support changes as the child moves through the system, and at times, there is a break in services for students. And because geographic boundaries across various authorities are not coterminous, duplication and gaps exist.

Successful education programs prepare students for transition throughout the education system and beyond high school. To ensure transition works well, uniform transition models are essential. As well, it is necessary to look at the life pathway for the child and link all systems to this pathway. All service providers need to have input in developing an overall plan for the individual child, and must also adopt and accept this plan. Parents of students with special needs should know what program their child will be in the next year, before the current school year ends.

Issues Identified

Transition from Early Childhood Services to Grade 1 is often difficult, as criteria, funding and programming change, and services from other agencies may decline. For example, funding for programs in Grade 1 does not provide for authorities to receive additional funding for students with communication disabilities. And, although speech language services are no longer available through education funding, parents indicate that school authorities should provide speech language services during the school day if their children require it.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 77.

Suggested Solutions

Require school jurisdictions and private Early Childhood Services operators to establish transition planning as a requirement for funding. A coordinated approach, including developing a comprehensive student record would ensure transition planning across all levels.

Develop a uniform model to make transitions work well and identify a key person at each school to ensure a transition plan is developed as part of the IPP.

Recommendations — Transition Planning

Recommendations

47. Short Term 1
That Alberta Learning communicate and highlight the requirements in the *Guide to Education for Students with Special Needs* for school authorities to develop and implement policy and procedures on transition planning for children and students with special needs. See also Recommendations — Accountability — Short Term 1, page 42.

48. Long Term 1
That coordinated delivery systems involving other government departments and agencies should continue to be made possible through partnerships, such as the Student Health Initiative.

49. Long Term 2
That Alberta Learning, in collaboration with the partners of the Student Health Initiative, monitor and study the work of the Student Health Initiative in the following areas.

- **Has the initiative improved coordinated services for students with special needs?**
- **Has the initiative improved the delivery of programs and services for students with special needs?**
- **What are some of the key elements that have made the partnerships work? See also Recommendations — Coordination of Services — Long Term 1, page 37.**

Use the results of the work of the Student Health Initiative to determine if there are areas where transition planning may be enhanced to ensure a continuum of services.

50. Long Term 3
That Alberta Learning, in collaboration with other ministries, educational partners and stakeholders, develop policy on transition planning to ensure a continuum of services from birth to the workforce or post-secondary education.

Best Practices

Issues Identified

Issues Identified

Current best practices of schools, school boards and service providers need to be identified and distributed.

Recommendations

Recommendations — Best Practices

51. Short Term 1

That Alberta Learning take the lead in partnership with education partners, stakeholders and service providers to identify and provide best practices to school authorities, parents and service providers in the following areas:

- **early identification and intervention of students with special needs**
- **information for parents of newborns on resources and supports available for children**
- **transition planning for students with special needs**
- **development and implementation of individualized program plans**
- **program delivery for students who are gifted and talented**
- **program delivery for students who have mild and moderate disabilities**
- **program delivery for students who have severe disabilities**
- **program delivery in rural and remote areas**
- **models of accountability currently in use in school authorities**
- **program delivery for students with special needs within school-based decision making**
- **allocation of special education funding in school authorities across the province**
- **recognizing students with special needs who have achieved the goals as outlined in their IPPs in school authorities.**

52. Short Term 2

That Alberta Learning expand the information on special education available on the department website to include information on best practices.

PROGRAM OUTCOMES/EVALUATION

Accountability

Issues Identified

Alberta Learning has a responsibility to students, parents and educators to be a custodian of quality education. Initiatives to decentralize decision making must have a long-term time frame for implementation, and include many built-in accountability measures that have stood the test of time. Inclusive education is fragile and at risk of failure. The custodians of the public purse at Alberta Learning must endeavor to ensure that funding for students with special needs is wisely spent and spent where it is most needed — in the classroom.

School authorities are accountable for programs and funding for students with special needs. They must develop a plan for special education that addresses how the programming needs of students with special needs are to be met. To do this, it is necessary to develop standards for identification, development and delivery of programs for students with special needs. School authorities must be monitored to ensure these standards are in place, and the needs of the students are identified and served.

Issues Identified

There is a lack of standard measures and insufficient accountability mechanisms for programming for students with special needs. The move to decentralize decision making to school authorities and individual schools is having both positive and negative implications for many students with special needs. For instance, some parents are having increasing difficulties obtaining the essential support services needed for successful programming and other parents have difficulty acquiring quality inclusive education. As well, parents who are not satisfied with the school's allocation of resources may have few options.

Although school authorities develop annual education plans and report on those plans, there is a perception that there is no school authority model for self-evaluation. There needs to be stricter monitoring and more accountability for how funding dollars are spent. As well, parents must be included in the accountability of how resources are allocated and provided to their children.

Programming needs to be developed, implemented and evaluated on a regular basis, and Alberta Learning must monitor this. There is a need for increased congruence between policies and expectations of Alberta Learning, and the practice of school authorities in identifying and meeting the needs of students with special needs. The current accountability model for students with severe disabilities focuses on compliance for funding rather than student program outcomes.

Suggested Solutions

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 77–78.

Develop standards and monitor school authorities based on student and programming outcomes, and ensure supports and services are being provided.

Develop a coordinated approach among government agencies and departments, and allocate resources to determine the extent to which students with mild and moderate disabilities, and students who are gifted and talented are identified and programming provided.

Provide models for school authorities for self-evaluation and include parents in accountability mechanisms.

Recommendations

Recommendations — Accountability

53. Short Term 1
That Alberta Learning monitor the requirements for programming and services for students with special needs in accordance with the *Guide to Education for Students with Special Needs*.

54. Long Term 1
That Alberta Learning, in collaboration with education partners and stakeholders, include standards and processes in an accountability framework for special education that focuses on student and program outcomes that holds school authorities accountable for:

- **programming for students with special needs**
- **measuring student and program outcomes that includes the individualized program plan**
- **developing and delivering programming for students with special needs within school-based decision making**
- **determining parent involvement in their children's education in the following areas:**
  - **parents as partners in the planning and delivery of programming for children with special needs**
  - **parent participation in transition planning for children with special needs at all levels**
  - **parent involvement in the placement of children with special needs**
  - **parent involvement in the development and implementation of the individualized program plan.**

That Alberta Learning pilot a framework by September 2001.

Recognition of School Completion

Issues Identified

Students with language learning disabilities and other mild/moderate disabilities are often unable to complete the requirements for a Grade 12 diploma within the age restriction for funding.

Issues Identified

In addition, there is no mechanism in place to recognize students who are unable to complete requirements for Grade 12 diplomas but have achieved the goals as outlined in their IPPs. This lack of formal recognition further disadvantages and inhibits post-school placements for students with special needs.

Recommendations — Recognition of School Completion

Recommendations

55. Long Term 1
That Alberta Learning develop a means of formally recognizing students with special needs upon completion of their schooling, including criteria and standards for measuring outcomes.

56. Long Term 2
That Alberta Learning consider a provision in the funding model to extend funding beyond the current age requirements to students with special needs who require an additional year to complete requirements for Grade 12 diplomas.

Appeals and Reviews

Issues Identified

The current appeal process at the local level and the review process at the ministerial level are not working well for parents of students with special needs. The processes are also not working well for school jurisdictions serving students with special needs.

Issues Identified

Parents are having an increasingly difficult time appealing for more education support time.

It is essential that Alberta Learning have an easily accessible appeal process that parents can utilize when school jurisdictions deny their children adequate services and support. The present system is time consuming and emotionally draining, as parents must go through too many levels of bureaucracy before being able to appeal to the Minister. The appeal process needs to be transparent, independent and quick. It must also be layperson friendly and fair. The necessary resources need to be available to support decisions.

Issues Identified (cont'd)

Parents' awareness of their right to appeal must be up-front. Expectations and outcomes need to be identified. For instance, what can parents expect? What level of service is provided? All parties must be on the same page. .There may be a need to delineate the limits of educational responsibility. To be more effective, appeals need to be more distant or impartial from education and involve outside agencies.

School jurisdictions should have to abide by the decision of Alberta Learning. To avoid losing a year of schooling, appeals should be fast tracked.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, pages 78–79.

Suggested Solutions

A comprehensive review of the appeal process at the local and provincial levels is required to streamline the process, and provide easy and speedy access to and through the process for parents and students.

Establish appeal panels or boards at the local and provincial levels. Streamline processes and develop procedures for evaluating the effectiveness of the processes for appeals and reviews. Identify expectations and outcomes for parents, and ensure that parents' awareness of their right to appeal is up-front.

Recommendations — Appeals and Reviews

Recommendations

57. Short Term 1
That Alberta Learning, in collaboration with the College of Alberta School Superintendents and the Alberta School Boards Association, develop an information package to communicate the current appeal and review processes to parents.

58. Long Term 1
That a working group be developed to review the current educational appeal and review processes, develop procedures for evaluating the effectiveness and outcomes, and recommend revisions to the current processes if necessary.

The review team recommends that Alberta Learning partner with education partners, stakeholders, service providers and consider the work of the Alberta Children's Initiative Disputes Resolution Review and the review of the *Review by the Minister* policy.

Recommendations (cont'd)

59. Long Term 2
That based on the results of Long Term Recommendation 1, Alberta Learning determine if the current appeal process under Section 103 (1) and ministerial review process under 104 (1) of the *School Act* require revision.

Role of the Special Education Advisory Committee

Issues Identified

Issues Identified

The continuing role of the Special Education Advisory Committee within Alberta Learning is unclear. The value placed on the committee's advisory role needs to be clarified. The committee has not been consulted with respect to a number of recent activities.

Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. For a complete synopsis of the suggestions on this topic, see Appendix C, page 79.

Suggested Solutions

Review, clarify and affirm the roles and responsibilities of the Special Education Advisory Committee.

Recommendations — Role of the Special Education Advisory Committee

Recommendations

60. . Short Term 1
That Alberta Learning, in collaboration with the Special Education Advisory Committee, review the roles and responsibilities of the committee.

Recommendations Related to Other Reviews and Initiatives

During the review, the committee identified issues and developed recommendations for initiatives currently underway by Alberta Learning, education partners and other stakeholder groups.

Report on Growth and Density Issues Faced by School Jurisdictions

What We Were Asked

The committee was asked to respond to the following recommendation from the *Report on Growth and Density Issues Faced by School Jurisdictions June 8, 2000.*

Recommendation 12: The committee recommends that the Special Education Review Team investigate and address the concerns of school jurisdictions regarding the incidence of special needs students across the province. In particular, the team should thoroughly review claims by school jurisdictions that they attract and serve a proportionately larger than average level of students with special needs, and provide additional compensation if it is determined that increased hardship is occurring. Alberta Learning should ensure that the level of resources provided to school jurisdictions serving special needs students is sufficient to cover the costs of providing that service.

Recommendations — Growth and Density Issues

Recommendations

61. Short Term 1

That the following feedback be provided to the Growth and Density Review Committee.

- **There is great variability across the province in terms of the incidence of students with special needs.**
- **The variability is not necessarily urban versus rural.**
- **The variability is not just based on growth and density.**
- **The proposed alternative funding model (see Recommendation — Funding for School Jurisdictions — Long Term 2, page 16) addresses the recommendation to investigate and address the concerns of school jurisdictions regarding the incidence of students with special needs across the province.**

Recruiting and Retaining Staff

Issues Identified

Issues Identified

There is a need for more human resources for students with special needs in rural and remote parts of Alberta. There is a regional disparity in the provision of services based on geography. As a result, it is difficult to access teachers for remote and rural areas.

Recommendations

Recommendations — Recruiting Staff

62. Short Term 1
That Alberta Learning, in collaboration with school jurisdictions, address the issue of recruiting and retaining staff to work with students with special needs.

That this recommendation be provided to the committee consisting of members from Alberta Learning and the Alberta School Boards Association currently being developed to look at teacher recruitment and retention.

Roles and Responsibilities of Teacher Assistants

Issues Identified

Issues Identified

There are inconsistencies in the roles of teachers' assistants. Across the province, there is a lack of uniformity in procedures and guidelines for teachers working with teachers' assistants. Principals need to be responsible for monitoring teachers and assistants.

Recommendations

Recommendations — Roles and Responsibilities of Teacher Assistants

63. Short Term 1
That the concerns raised in the Special Education Review about the roles and responsibilities of teacher assistants be provided to the current initiative between the Alberta Teachers' Association and the Council on Alberta Teaching Standards regarding the roles and responsibilities of teacher assistants and teachers supervising teacher assistants.

Funding for Enhancing School Facilities

Issues Identified

Issues Identified

There is a need to ensure that sufficient funding is provided to allow for barrier-free facilities for students with special needs.

School utilization rates should recognize space needs for integrated services at the school.

There is an inability to enhance school facilities and equipment relating to special education needs, such as ramps, elevators, washrooms, prescriptive equipment, etc., from within the current funding sources. Currently, these upgrades are expected to be completed through the "Building Quality Restoration Program" (BQRP).

Recommendations

Recommendations — Funding for Enhancing School Facilities

64. Short Term 1

That the following recommendations on funding for enhancing school facilities be provided to Alberta Infrastructure for consideration.

- **Explore the possibility of adjusting the BQRP fund each year based on a cost model driven by overall student numbers and the increase in students with special needs provincially.**
- **Plan and build schools with rooms for team meetings and therapies to be provided to students. School utilization rates should recognize space needs for education programming needs of students with special needs and integrated services at the school.**

CONCLUSIONS

The committees identified two additional recommendations fundamental to the review.

Recommendations

65. Short Term
That the Special Education Review report be provided to those education partners, service providers, stakeholders, other Ministries and branches of Alberta Learning identified in the recommendations in the report.

66. Long Term 1
That the Minister of Learning provide an update indicating the progress of the action plan to address the recommendations included in this report by June 2004.

RECOMMENDATIONS SUMMARY

Streamlining Administrative Processes

Administrative Requirements for Severe Disabilities Funding

1. Short Term 1
   That Alberta Learning implement the following immediately for the 2000/2001 school year.
   - That Alberta Learning provide copies to all school authorities of the new *Handbook for the Identification and Review of Students with Severe Disabilities* developed with the College of Alberta School Superintendents.
   - That Early Childhood Services children who meet eligibility criteria for conditions other than communication under Program Unit Funding, be automatically eligible for Severe Disabilities funding in Grade 1 without review of documentation.
   - That Alberta Learning extend the March 1 count to all eligible students with severe disabilities in a school authority who were identified after September 30.
   - That the deadline for school authorities to identify students with severe disabilities, who were in attendance on September 30, be extended to November 30 to allow school authorities additional time to identify all students with severe disabilities.
   - That Alberta Learning extend by one year the three-year cycle for monitoring all previously identified students with severe disabilities and include only new students for monitoring.
   - That Alberta Learning, in collaboration with education partners, stakeholder groups and service providers, clarify policy, procedures and regulations that have created areas of confusion to parents and schools, and communicate this to parents, trustees, MLAs and school authorities.

Funding for School Jurisdictions and Private Schools

Funding for School Jurisdictions

2. Short Term 1
   That for the 2000/2001 school year, funding for students with severe emotional/behavioural disabilities be increased to the same level as for all other students with severe disabilities.

3. Short Term 2
   That for the 2000/2001 school year, funding for students with mild and moderate disabilities, and students who are gifted and talented continue to be included in the Basic Instruction funding provided for all students in a school jurisdiction. The level of funding available in the Basic Instruction

funding for students with mild and moderate disabilities, and students who are gifted and talented should be clearly identified in Alberta Learning documents as a minimum amount school jurisdictions are expected to pool for programming for students. See also Recommendations — Accountability — Short Term 1 and Long Term 1, page 42.

4. Long Term 1
   That for the 2001/2002 school year, the level of funding included in the Basic Instruction funding for students with mild and moderate disabilities and students who are gifted and talented be increased to accommodate the transition from ECS to Grade 1.

5. Long Term 2
   That for the 2001/2002 school year, for students with severe disabilities in school jurisdictions, funding be provided based on a school jurisdiction profile. The profile would be based on historical data of students with severe disabilities served plus the pattern of growth over the past five years of students with severe disabilities in the jurisdiction. The profile would also include projections for growth of the number of students with severe disabilities.

   That Alberta Learning collaborate and consult with all school jurisdictions over the next six months to establish their profile for funding students with severe disabilities and phase in the proposed model of funding across school jurisdictions as appropriate.

6. Long Term 3
   That the issues and suggested solutions for alternative funding models identified by the Special Education Review Team be provided to the Review Committee on Outcomes for consideration in the review of the funding framework.

Funding for Private Schools

7. Short Term 1
   That Alberta Learning continue to fund regular private schools using the current funding model for students with special needs.

Funding for Designated Special Education Private Schools

8. Short Term 1
   That Alberta Learning change the current model to provide funding for students with mild and moderate disabilities directly to designated special education private schools at no cost to the resident school jurisdiction.

9. Short Term 2
That Alberta Learning change the current model to provide funding for students with severe disabilities directly to designated special education private schools.

Identification of Students with Special Needs

Early Identification and Intervention

10. Short Term 1
That Alberta Learning emphasize, communicate and highlight the requirements in the *Guide to Education for Students with Special Needs* for school authorities to develop and implement policy to ensure the early identification and intervention of students with special needs in education programs. See also Recommendations — Accountability — Short Term 1, page 42.

11. Short Term 2
That education partners, stakeholders and service providers collaborate to address the issues in the Special Education and Native Policy reviews for the identification, programming and services for Aboriginal students with special needs.

12. Long Term 1
That the Alberta Government develop policy to support the early identification and screening of children, and develop a provincial early identification/screening program.

The review team recommends that Alberta Health and Wellness take the lead in partnership with other ministries and service providers.

That the early identification/screening program recommended above be piloted prior to full implementation.

13. Long Term 2
That service providers, stakeholders and education partners work collaboratively to enable parents of newborns to have pertinent information on accessing resources and supports for children.

Assessment of Students

14. Short Term 1
That Alberta Learning assist school authorities in interpreting the current criteria and definitions of severe disabling conditions through the release of the *Handbook for the Identification and Review of Students with Severe Disabilities* developed in collaboration with the College of Alberta School Superintendents.

15. Short Term 2
That the collaborative work between the College of Alberta School Superintendents and Alberta Learning be extended, and include other partners and stakeholders to develop a handbook for the identification of students with mild and moderate disabilities, including a section on students who are gifted and talented.

16. Short Term 3
That Alberta Learning, in collaboration with education partners, stakeholders and service providers, review the present criteria for identification and coding of students with special needs, and develop standards for identification based on the programming and learning needs of students with special needs.

17. Short Term 4
That Alberta Learning take the following steps to ensure school authorities have the information and assistance necessary to identify all students with special needs:
- clarify and develop standard definitions based on the programming and learning needs of students with special needs (see also Short Term 3 above)
- assist school authorities to identify students with special needs for education programming
- with school authorities, emphasize, highlight and communicate the requirements in the *Guide to Education for Students with Special Needs* for the assessment of students with special needs. See also Recommendations — Accountability — Short Term 1, page 42.

18. Short Term 5
That Alberta Learning include in its review of sensory multihandicapped services, the recommendation of the Special Education Review committees to consider expanding the mandate to provide assessment, consultation and inservice in support of all funded students with severe disabilities.

19. Long Term 1
That Alberta Learning, in collaboration with education partners and service providers, develop policy and provide direction on the use of assessment criteria for educational programming purposes to promote appropriate assessment practices for students with special needs.

Program Development/Delivery

Professional Development

20. Short Term 1
    That the Special Programs Branch of Alberta Learning continue to collaborate with the Alberta Teachers' Association Special Education Council in the annual Special Education Conference and continue to liaise with other Alberta Teachers' Association Councils.

21. Short Term 2
    The review team recommends that regional consortia take the lead in collaboration with education partners, stakeholders and service providers to identify professional development inservice areas of need for educators, parents and service providers of students with special needs.

22. Short Term 3
    The review team recommends that regional consortia work with Alberta Learning, education providers and stakeholders to enhance the education and professional development programs provided by the consortia to include special education information in other curriculum initiatives provided by the consortia.

23. Long Term 1
    That post-secondary institutions ensure that all graduating teachers successfully complete coursework in adapting and modifying curriculum, developing individualized program plans, and implementing appropriate instructional practice and strategies to promote classroom environments conducive to meeting the needs of students with special needs, as well as course work in providing programs for students with special needs.

24. Long Term 2
    That post-secondary institutions work with education partners to develop alternative ways of providing preservice and inservice courses on special education; e.g., video conferencing.

Availability of Qualified Staff and Service Providers

25. Short Term 1
    That Alberta Learning continue its work with post-secondary institutions to add additional spaces in programs where there is a shortage of professionals; e.g., recent announcement on additional spaces for speech language pathologists.

26 Long Term 1
    That Alberta Learning, in collaboration with other government ministries, education partners, stakeholders and service providers, continue to identify and track those areas where there is a shortage of professionals.

Resources

27. Short Term 1

That Alberta Learning develop a brochure to distribute to educators and parents upon the release of the manual *Teaching Students with Emotional Disorders and/or Mental Illnesses*.

28. Short Term 2

That Alberta Learning revise the *Guide to Education for Students with Special Needs* to emphasize, communicate and highlight the requirements of school authorities in, but not limited to, the following areas:

- for schools and school authorities to work directly with parents and other service providers in the identification of students with special needs
- for identifying students with special needs
- for providing inservice opportunities for educators providing programs for students with special needs
- for including parents in placement and program decisions, and in the development and implementation of individualized program plans
- for developing and implementing individualized program plans for all students with special needs
- for identifying a key professional teacher with special education expertise at each school to coordinate programs for students with special needs
- for coordinating the delivery of services for children
- for providing parents of students with special needs with policies and procedures, including those procedures related to appeals and reviews.

29. Short Term 3

That Alberta Learning revise the parent handbook *Partners During Changing Times* to highlight and communicate information for parents in the following areas, as well as other areas of special education:

- polices, procedures and individualized program plans for students with special needs
- information for parents on how to access services for students with special needs
- transition planning for students with special needs at all levels
- appeal processes at the local level and review processes at the ministerial level
- information on working together with the school and other service providers.

30. Short Term 4

That Alberta Learning provide school authorities with the names and telephone numbers of resource people within the department to answer

questions and concerns from school authorities on students with special needs.

31. Short Term 5
That Alberta Learning, in collaboration with education partners, stakeholders and service providers, place a high priority on ensuring that special education resources continue to be developed for teachers and parents of students with special needs.

32. Short Term 6
That Alberta Learning place a high priority on ensuring that the special education resources developed are inserviced through a series of workshops for educators.

33. Long Term 1
That Alberta Learning, in collaboration with education partners, develop a mechanism to determine the results and impact that resources developed by Alberta Learning have on programming for students with special needs.

Adaptive Technology

34. Short Term 1
That Alberta Learning collaborate with education partners, service providers and stakeholders to identify a repository/clearing house of services for acquiring technology for students with special needs.

35. Long Term 1
That Alberta Learning take the lead in collaboration with education partners and service providers to develop a mechanism to determine the assistive/adaptive technology and equipment needs of students with special needs, and create a plan to coordinate the provision of technology and equipment to students with special needs.

Individualized Program Plans

36. Short Term 1
That Alberta Learning continue to update information on the development of individualized program plans in the *Programming for Students with Special Needs* series, Book 3: *Individualized Program Plans* and develop an electronic database with standards for individualized program plans for use by school authorities.

37. Short Term 2
That Alberta Learning and school authorities communicate, highlight and emphasize the requirements in the *Guide to Education of Students with Special Needs* for the development and implementation of individualized program plans. See also Recommendations — Accountability — Short Term 1, page 42.

Parent Involvement

38. Short Term 1
That Alberta Learning communicate, highlight and emphasize the requirements in the *Guide to Education for Students with Special Needs* for school authorities to develop clear policy and guidelines for the involvement of parents in identification, development of individualized program plans and program delivery for students with special needs. See also Recommendations — Accountability — Short Term 1, page 42.

39. Short Term 2
That Alberta Learning communicate, highlight and emphasize in the current review of the *Special Education* and *Educational Placement of Students with Special Needs* policies and in the *Guide to Education for Students with Special Needs*, that opportunities be provided for parents of students with special needs to be involved as partners in their children's education.

40. Long Term 1
That Alberta Learning, in collaboration with other education partners and stakeholders develop an accountability mechanism for parent involvement in placement and program decisions. See also Recommendations — Accountability — Long Term 1, page 42.

Gifted and Talented

41. Short Term 1
That Alberta Learning include in an accountability framework monitoring of programming for students who are gifted and talented. See also Recommendations — Accountability — Long Term 1, page 42.

42. Short Term 2
That Alberta Learning develop a pamphlet for school authorities and parents on the funding, policy and resources available for the delivery of programs for students who are gifted and talented.

43. Short Term 3
That the collaborative work between the College of Alberta School Superintendents and Alberta Learning be extended to include other partners and stakeholders to develop a handbook for the identification of students with mild and moderate disabilities, including a section on students who are gifted and talented. See also Recommendations — Assessment of Students — Short Term 2, page 23.

44. Long Term 1
That Alberta Learning, in collaboration with Alberta School Boards Association and College of Alberta School Superintendents, assist school

authorities to develop and implement policies for providing programs for students who are gifted and talented.

Coordination of Services

45. Long Term 1

That Alberta Learning, in collaboration with the partners of the Student Health Initiative, monitor and study the work of the Student Health Initiative in the following areas.

- Has the initiative improved coordinated services for students with special needs?
- Has the initiative improved the delivery of programs and services for students with special needs?
- What are some of the key elements that have made the partnerships work?

Based on the study of the Student Health Initiative, that Alberta Learning develop a guide for school authorities to assist them in developing collaborative models in other areas.

46. Long Term 2

That the Alberta Government explore the use of the individualized program plan as a mechanism for implementation of a joint-service plan for students with special needs that reflects the integration of supports and services.

The review team recommends that the cooperating ministries of the Alberta Children's Initiative take the lead in collaboration with education partners, service providers and stakeholders.

Transition Planning

47. Short Term 1

That Alberta Learning communicate and highlight the requirements in the *Guide to Education for Students with Special Needs* for school authorities to develop and implement policy and procedures on transition planning for children and students with special needs. See also Recommendations — Accountability — Short Term 1, page 42.

48. Long Term 1

That coordinated delivery systems involving other government departments and agencies should continue to be made possible through partnerships, such as the Student Health Initiative.

49. Long Term 2

That Alberta Learning, in collaboration with the partners of the Student Health Initiative, monitor and study the work of the Student Health Initiative in the following areas.

- Has the initiative improved coordinated services for students with special needs?
- Has the initiative improved the delivery of programs and services for students with special needs?
- What are some of the key elements that have made the partnerships work? See Recommendations — Coordination of Services — Long Term 1, page 37.

Use the results of the work of the Student Health Initiative to determine if there are areas where transition planning may be enhanced to ensure a continuum of services.

50. Long Term 3
That Alberta Learning, in collaboration with other ministries, educational partners and stakeholders, develop policy on transition planning to ensure a continuum of services from birth to the workforce or post-secondary education.

Best Practices

51. Short Term 1
That Alberta Learning take the lead in partnership with education partners, stakeholders and service providers to identify and provide best practices to school authorities, parents and service providers in the following areas:
- early identification and intervention of students with special needs
- information for parents of newborns on resources and supports available for children
- transition planning for students with special needs
- development and implementation of individualized program plans
- program delivery for students who are gifted and talented
- program delivery for students who have mild and moderate disabilities
- program delivery for students who have severe disabilities
- program delivery in rural and remote areas
- models of accountability currently in use in school authorities
- program delivery for students with special needs within school-based decision making
- allocation of special education funding in school authorities across the province
- recognizing students with special needs who have achieved the goals as outlined in their IPPs in school authorities.

52. Short Term 2
That Alberta Learning expand the information on special education available on the department website to include information on best practices.

Program Outcomes/Evaluation

Accountability

53. Short Term 1
That Alberta Learning monitor the requirements for programming and services for students with special needs in accordance with the *Guide to Education for Students with Special Needs.*

54. Long Term 1
That Alberta Learning, in collaboration with education partners and stakeholders, include standards and processes in an accountability framework for special education that focuses on student and program outcomes that holds school authorities accountable for:
- programming for students with special needs
- measuring student and program outcomes that includes the individualized program plan
- developing and delivering programming for students with special needs within school-based decision making
- determining parent involvement in their children's education in the following areas:
  - parents as partners in the planning and delivery of programming for children with special needs
  - parent participation in transition planning for children with special needs at all levels
  - parent involvement in the placement of children with special needs
  - parent involvement in the development and implementation of the individualized program plan.

That Alberta Learning pilot a framework by September 2001.

Recognition of School Completion

55. Long Term 1
That Alberta Learning develop a means of formally recognizing students with special needs upon completion of their schooling, including criteria and standards for measuring outcomes.

56. Long Term 2
That Alberta Learning consider a provision in the funding model to extend funding beyond the current age requirements to students with special needs who require an additional year to complete requirements for Grade 12 diplomas.

Appeals and Reviews

57. Short Term 1

That Alberta Learning, in collaboration with the College of Alberta School Superintendents and the Alberta School Boards Association, develop an information package to communicate the current appeal and review processes to parents.

58. Long Term 1

That a working group be developed to review the current educational appeal and review processes, develop procedures for evaluating the effectiveness and outcomes, and recommend revisions to the current processes if necessary.

The review team recommends that Alberta Learning partner with education partners, stakeholders, service providers and consider the work of the Alberta Children's Initiative Disputes Resolution Review and the review of the *Review by the Minister* policy.

59. Long Term 2

That based on the results of Long Term Recommendation 1, Alberta Learning determine if the current appeal process under Section 103 (1) and ministerial review process under 104 (1) of the *School Act* require revision.

Role of the Special Education Advisory Committee

60. Short Term 1

That Alberta Learning, in collaboration with the Special Education Advisory Committee, review the roles and responsibilities of the committee.

Recommendations Related to Other Reviews and Initiatives

Growth and Density Issues

61. Short Term 1

That the following feedback be provided to the Growth and Density Review Committee.

- There is great variability across the province in terms of the incidence of students with special needs.
- The variability is not necessarily urban versus rural.
- The variability is not just based on growth and density.
- The proposed alternative funding model (See Recommendation — Funding for School Jurisdictions — Long Term 2, page 16) addresses the recommendation to investigate and address the concerns of school jurisdictions regarding the incidence of students with special needs across the province.

Recruiting Staff

62. Short Term 1

That Alberta Learning, in collaboration with school jurisdictions, address the issue of recruiting and retaining staff to work with students with special needs.

That this recommendation be provided to the committee consisting of members from Alberta Learning and the Alberta School Boards Association currently being developed to look at teacher recruitment and retention.

Roles and Responsibilities of Teacher Assistants

63. Short Term 1

That the concerns raised in the Special Education Review about the roles and responsibilities of teacher assistants be provided to the current initiative between the Alberta Teachers' Association and the Council on Alberta Teaching Standards regarding the roles and responsibilities of teacher assistants and teachers supervising teacher assistants.

Funding for Enhancing School Facilities

64. Short Term 1

That the following recommendations on funding for enhancing school facilities be provided to Alberta Infrastructure for consideration.

- Explore the possibility of adjusting the BQRP fund each year based on a cost model driven by overall student numbers and the increase in students with special needs provincially.
- Plan and build schools with rooms for team meetings and therapies to be provided to students. School utilization rates should recognize space needs for education programming needs of students with special needs and integrated services at the school.

CONCLUSIONS

65. Short Term 1

That the Special Education Review report be provided to those education partners, service providers, stakeholders, other Ministries and branches of Alberta Learning identified in the recommendations in the report.

66. Long Term 1

That the Minister of Learning provide an update indicating the progress of the action plan to address the recommendations included in this report by June 2004.

APPENDIX A

Glossary of Terms

Designated Special Education Private School

This is a private school that meets the following criteria:

- The sole purpose of the school is to serve students with special needs, and all students who are enrolled in the school are diagnosed with needs at the mild, moderate or severe levels
- The education programs provided to the students require modifications to the programs of study, and are specified in Individualized Program Plans (IPPs) for each student
- Approvals for designation as a special education private school are obtained from the Minister by submitting a request to the Director of Special Programs.

Education Partners

These are groups of individuals with specified joint rights and responsibilities working together for the purpose of meeting common objectives; e.g., government departments, other provincial or territorial governments and key stakeholders.

The education partners who participated in this review are listed in the front of this document under Special Education Review Team — Key Partners Steering Committee.

Individualized Program Plan

This is a concise plan of action designed to address the student's special needs, and is based on diagnostic information which provides the basis for intervention strategies. All students with exceptional needs, from severely disabled to the gifted and talented, require an IPP.
The IPPs of children with exceptional needs will identify:

- specific educational and non-instructional strategies
- long-term goals and short-term objectives
- evaluation procedures and diagnostic information on which the plan is based
- review dates
- placement plans for children who are served outside the regular classroom
- placement plans to reintroduce students back into the regular classroom.

School Authorities

These are school jurisdictions, private schools and private ECS operators.

Service Providers

For purposes of this review, service providers are government, regional and community agencies and individuals who provide services to students with special needs.

Stakeholders

These are groups or individuals with an interest in the operations and outcomes of the organization; e.g., include taxpayers, organizations, agencies, institutions, community groups.

The stakeholders who participated in this review are listed in the front of this document under Special Education Review Team — Stakeholder Advisory Committee.

Students with Special Needs

This includes students with mild, moderate and severe disabilities, and students who are gifted and talented.

Due to the length of the Alberta Learning definitions of students with mild/moderate disabilities, students with severe disabilities and students who are gifted and talented, the reader is referred to the Alberta Learning, *Student Information System User's Guide* (revised August 2000).

APPENDIX B

Chronology of Events

The following is a chronology of events that lead to the completion of the review and report.

March 2000 The Minister of Learning, Dr. Lyle Oberg, announces a review of the delivery of special education programs and services.

Dr. Susan Lynch, Assistant Deputy Minister, Basic Learning Division, is named chair for the Special Education Review.

Organizations for inclusion in the Key Partners Steering Committee are identified.

April 2000 Organizations submit the names of representatives and the Key Partners Steering Committee is named.

On April 19 and 20, the first meeting of the Key Partners Steering Committee is held. The committee identifies the focus and direction of the review. Members report on current initiatives underway in their organizations and identify issues of concern to their organizations. The Key Partners Steering Committee identifies a number of key issues of concern in special education. The issues are placed into the following four categories and later combined into three:

- identification of students with special needs
- program development
- program delivery
- program evaluation.

Organizations for inclusion in the Stakeholder Advisory Committee are identified and letters are sent to each of the organizations requesting a representative to the advisory committee.

A draft discussion paper is developed based on the identified issues and distributed to the Key Partners Steering Committee.

May 2000 On May 11, the Key Partners Steering Committee meets to review and further develop the discussion paper.

On May 17, the Stakeholder Advisory Committee and Key Partners Steering Committee meet to review and finalize the discussion paper. Using their own expertise and knowledge, as well as that of the organizations they represent, committee members identify issues of concern to their organizations, consult, develop and validate the issues and solutions with their membership, and table the discussion paper indefinitely.

June 2000 Results of the consultation are consolidated and distributed to the Key Partners Steering Committee and Stakeholder Advisory Committee.

On June 26, Key Partners Steering and Stakeholder Advisory Committee members collaboratively discuss the submissions, identify key issues of concern and recommend solutions.

July 2000 Based on the key issues and solutions identified, recommendations are developed and provided to each member for response.

Members of each committee identify and prioritize the recommendations and the Stakeholder Advisory Committee determines that it does not require an additional meeting to discuss the recommendations further.

On July 31, the Key Partners Steering Committee meets to review the analysis of responses to the recommendations for action. During the process, the committee identifies the need to propose an alternative funding model which they believe will address issues concerning assessments, administrative requirements and accountability, and address the recommendations to the Minister. The Key Partners Steering Committee discusses and requests further research on funding scenarios.

August 2000 On August 14, the funding scenarios are provided to the Key Partners Steering Committee for their review and consultation.

On August 21, the Key Partners Steering Committee meets to review the funding scenarios and further develop a proposed funding model for recommendation to the Minister. Recommendations are further discussed and revised.

Sept. 2000 On September 1, a first draft of the report is sent to Key Partners Steering Committee members for their response.

On September 8, the Key Partners Steering Committee members meet to review the first draft of the report.

On September 15, the Key Partners Steering Committee and Stakeholder Advisory Committee members meet to review the recommendations and the report.

On September 22, the Key Partners Steering Committee meets to complete the report based on feedback from the Stakeholder Advisory Committee.

On September 26, all Committee members review the final report.

Nov. 2000 The report is provided to the Minister of Learning, Dr. Lyle Oberg.

APPENDIX C

Synopsis of Suggested Solutions

During the review, a wide variety of solutions were suggested to address the issues. Some suggestions may only have been provided by one team member and are not necessarily reflective of the entire review team's point of view. The following is a complete synopsis of suggestions.

Streamlining Administrative Processes

Administrative Requirements for Severe Disabilities Funding

Suggested Solutions

- Move to an accreditation process for school jurisdictions demonstrating good practice.
- Reduce the frequency of monitoring previously approved students.
- Remove the requirement to reapprove Program Unit Funded students as they enter Grade 1.
- Accept the category of severe communication to Grade 3, as communication is fundamental to learning.
- Approve funding in advance; monitor new students only.
- Move away from per-student funding to incidence level.
- Adjust the September 30 deadline to the end of October or provide pro-rated funding throughout the year as needs are documented.
- Use a computer database to track students' needs and programming. Some districts requested more clarification. Could districts access this database for information on incoming students?
- Provide Severe Disability funding to school jurisdictions based on established incidences and reasonable funding increases, and allow jurisdictions to determine the eligibility of students for their programs.
- Focus monitoring by Alberta Learning on compliance, ensuring appropriate numbers of students are being served and that programs are appropriate to the needs of the students.
- Provide a clear and concise format for schools to follow, including specifics on what documentation will be accepted, what is meant by "recent," what reports are required by Alberta Learning (keeping in mind the need to streamline the process and reduce administrative paperwork).
- Ensure that all departments of Alberta Learning; e.g., School Finance that distributes the payments, are informed of the process. A help line was suggested with phone calls returned in a reasonable time frame by individuals who can follow up with questions and/or concerns from schools.
- Complete reviews in a matter of weeks, not several months. A suggestion was to have documentation and individualized program

plans submitted to Alberta Learning at the same time that the coding information is submitted; i.e., with September 30th submission.

- Keep the system the way it is but change the practice at the school level.
- With the information available, it is reasonable to expect a decision within a two to three week time frame. This would be particularly beneficial to small schools that cannot afford to absorb the loss in the event that funding is denied in February or March.
- Provide funding to schools that wait an unreasonable length of time for a response from Alberta Learning once they demonstrate that they have already incurred the costs of programming for the student.
- Explore the possibility of providing conditional approval based on early assessment and documentation, followed by additional supporting information as required. At the point students with severe disabilities are approved "in full," consider making them three-year approvals to coincide with the assessment cycle.
- Request all monitoring forms be reviewed one month prior to the audit.
- Eliminate unnecessary retesting.
- Add instructions "to review prior to audit" to the monitoring sheet.
- Block fund students with severe disabilities at the beginning of the year with a built-in inflation factor and other appropriate indices.

Funding for School Jurisdictions and Private Schools

Suggested Solutions

- Earmark funding for students with mild/moderate special needs and provide as a separate grant to jurisdictions.
- Put all of the following in place:
  - provide one source of funding to school jurisdictions for all students
  - ensure parents of children with developmental disabilities or special needs can choose an inclusive education without question
  - ensure that the provision of classroom supports is not contingent on funding but on the needs of the student with special needs (classroom supports are thus a matter of negotiation relative to educational needs only)
  - advise all parents that school jurisdictions receive funding to educate children with special needs, that placement is their choice, that classroom supports are to be determined jointly according to the educational needs of the child, and that classroom supports are not a function of funding
  - establish transparent accountability mechanisms
  - negotiate the sufficiency of funding for school districts on the basis of the preceding principles.

- Provide parents with a budget and allow them to manage services for children; include an accountability mechanism.
- Leave it to the school jurisdiction to decide where and when the dollars are to be spent.
- Fund the program that meets the child's needs not the other way around.
- Fund on outcomes rather than eligibility.
- If Alberta Learning plans to completely overhaul its system, consideration could be given to implementing a population-based funding approach instead of providing special funding to identified students according to disability codes. With this approach, per capita Basic Instructional funding would be allocated based on an authority's student enrollment. The funding methodology would allocate additional funds according to the incidence of mild/moderate and severe disabilities; e.g., percent of total student population, and key socio-economic characteristics of the authority/student population; e.g., income, Aboriginal population, number of children in care, HCS caseload, age of students. The methodology would need to take into account that several authorities; e.g., Edmonton, Calgary, Lethbridge, Red Deer and Grande Prairie are service magnets which attract families of children with special needs and children in care. If this funding approach is implemented, Alberta Learning may consider introducing a no-loss policy. This would facilitate stability and long-term planning by ensuring that school authorities receive at least their previous year's level of funding and would protect those facing funding reductions as a result of the new methodology. This approach would eliminate student codes and labeling. School authorities would get a pool of funding with which to meet students' needs — basic instructional and special. As a result, different accountability and monitoring mechanisms would be required to ensure services/supports are provided to meet the needs of students with special needs and to determine student outcomes.
- If Alberta Learning plans to maintain its funding system, some modifications should be considered. Funding allocations for mild, moderate and severe disabilities should be established on a scale to better reflect student needs within each of the categories. Students with severe disabilities would get the largest special funding allocation. Students with moderate disabilities would get less, and students with mild disabilities would get the least.
- Provide support for "full-cost recovery" for substantiated financial needs identified and supported by jurisdictional documentation for those students that fit into this unique category. A ceiling could be established for individual categories based on average costs.
- Explore the creation of a third funding category for the Grade 1–12 students with special needs who are severe moderate, at a rate of X

percent of the rate for students with severe disabilities, to match the program costs that need to be provided for this group of students. Consider modifications to funding in which allocations for mild, moderate and severe disabilities are established on a scale to better reflect student needs within each of the categories.

- Enable school divisions to submit a profile to Alberta Learning with the program needs of the student outlined and have funding provided, rather than having funding provided and trying to fit the program to the dollars allocated.
- Create a separate moderate funding category in a student's name to ensure that children with Down's syndrome and other moderate conditions can access appropriate services. Ensure that there are sufficient funds allocated for education assistant support and increase accountability for expenditure of funds.
- Identify the nature of the therapeutic needs of the student and then assign a dollar allowance to the student.
- Change current Severe Disabilities funding for a mechanism that reflects program needs. Provide for block funding and allow professionals (under specific guidelines) to decide on the appropriate allocations.
- Funding of long-term, ongoing IPPs is a more effective and efficient use of resources than frequent reassessments.
- Separate dollars allotted for gifted and talented, and mild/moderate from per capita funding. It is easier to track and ensure the dollars are reaching the child.
- Severe Disabilities funding should be based on established incidences and reasonable funding increases, and allow jurisdictions to determine eligibility of students for programming. Monitoring by Alberta Learning should focus on compliance, ensuring students are being served and programming is appropriate to their needs.
- Direct funding for designated special education private schools should not penalize the publicly funded system, and all requirements by Alberta Learning should be equal for both private and public schools.
- Funding should be based on the individual child's need.
- Bring in other partners and resources.
- Communicate information on funding for students with mild/moderate and severe disabilities to all parents.

Identification of Students with Special Needs

Early Identification and Intervention

Suggested Solutions

- Establish criteria to address learning, behavioural and emotional needs from a broader perspective, rather than from a narrow psychiatric perspective. This would afford opportunity for earlier intervention, create flexibility as to who is qualified to determine needs, and reduce repeated assessments.
- Consider a portfolio initiated by parents that would move with the child from system to system.
- Approach other agencies and departments involved in the education of students with special needs with the goal of developing and implementing comprehensive early identification programs.
- Develop consistent identification processes across the province that are comprehensive, universal and have easily understood identification procedures.
- Consider including the category of severe learning disabilities as eligible for Severe Disabilities funding.
- Parents need to be provided information on the appropriate disciplinary measure for their children with special needs.
- Separate funding from identification of need.
- Amend the *School Act* (Section 29) to require school authorities to identify students with special needs.
- Use demographic information and earliest detection to better plan for future needs.

Assessment of Students

Suggested Solutions

- Review present criteria and provide standards for the identification of students with mild/moderate needs and students who are gifted and talented.
- Develop and distribute model policies and standards for admission to, and the provision of, special education programs within school jurisdictions and monitor to determine compliance.
- Change criteria to reflect a broader range of students with special needs or move to a profile approach.
- Establish common criteria for coding for learning disabilities to ensure that they are based on identification and not on determining or maintaining a specific number of students eligible for funding/programming.
- Increase assessments for students with mild and moderate disabilities.

- Change current assessment criteria to assessment criteria that are relevant and directly linked to appropriate individualized program plans (IPPs).
- Develop a process that allows for individuals to be identified as no longer requiring programming. The process must be sensitive enough to prevent undue repeat assessments while still acknowledging change and growth. The level of the student's needs should become the factoring guide for the degree of assistance.
- Focus on new flexibility, including diagnostic screening.
- Expand the mandate of Regional Assessment Services, Regional Education Assessment and Consultation Services (REACH), Edmonton Consulting Services and Coordinated Assessment Services for the Exceptional (CASE).
- Approach those working in the Student Health Initiative to develop a comprehensive list of assessment services and service providers by jurisdiction.
- Request assessments that are directly related to developing appropriate education programming.
- Ensure cooperation and commitment by all service providers.

Program Development/Delivery

Professional Development

Suggested Solutions

- Increase levels of preparation at the university for all education students. Course work and special education information need to be infused into the education program.
- Emphasize in the *Guide to Education for Students with Special Needs* the need for expertise both at the central office level and school level.
- Encourage post-secondary institutions to offer special education courses and practicum for all teachers in the field of education.
- Develop and provide special education courses and workshops that teachers can access during the summer or on site.
- Have more special education teachers graduating and have standards of certification.
- Enhance the training and professional development programs provided through the regional consortia for special education programs, similar to other curriculum initiatives facilitated through the consortia.
- Ensure properly trained staff capable of identifying problems exist not necessarily to diagnose problems, but to listen to parents expressing concern over possible problems.
- Assist teachers to be able to direct parents to the help they need to understand what is happening in their families. Teachers, administrators, etc. need to embrace the intent of the Children's

Services Initiative and allow other professionals and members of the school community to jointly problem solve.

- Require, as a condition for certification, that all teachers receive education and professional development in strategies proven effective for students with learning disabilities.
- Identify post-secondary students in education faculties early and set up career counselling services for students who stay in education programs and increase coursework in special education.
- Develop creative solutions, including alternatives to traditional settings, such as internet/video conferencing for peer interaction.
- Develop standard of service criteria in the areas of braille instruction, orientation and mobility, and access to information that school jurisdictions would be required to follow.
- Emphasize teaching children with special needs at university faculties of education.
- Encourage greater collaboration between all educational stakeholders; e.g., Alberta Learning, school jurisdictions, etc., and the major teacher training institutions.
- Look at other teaching models; e.g., rehabilitation practitioner model.

Availability of Qualified Staff and Service Providers

Suggested Solutions

- Provide a mechanism to increase the number of graduates from post-secondary institutions to supplement the services and expertise currently unavailable.
- Necessitate a higher level of cooperation and commitment by all service providers. The province has a responsibility to ensure adequate numbers of professionals are trained and available.
- Increase the education and professional development for service providers who serve the deaf.
- Mandate standard of service criterion in the area of Braille and access to information that school authorities are required to follow.
- Increase interpreting services.
- Increase availability of bursaries.
- Provide leadership in the area of visual impairment and blindness. This could involve having a professional in the area of blindness and visual impairment on staff in the Special Programs Branch.
- Increase the number of professionals available to Student Health.

Resources

Suggested Solutions

- Consider retaining the resource development function and budget in the Special Programs Branch.

- Continue to work with stakeholders, education partners and service providers to develop resources and provide professional development.
- Review the highly specialized training programs for school-age students and make recommendations on their effectiveness.
- Provide lists of Alberta Learning personnel in the area of special education.
- Encourage classroom-based intervention: resources could be utilized to assist teachers with classroom-based interventions as a first choice intervention, thereby reducing segregation and labeling.

Adaptive Technology

Suggested Solutions

- Alberta Learning create a branch of the Special Programs department that would be responsible for providing the hardware, software, implementation, training and ongoing technical support for all adaptive computer technologies for students with special needs.
- Develop protocol that reflects specific needs based on disability. Provide additional funding to support these identified needs.
- Provide for a "clearing house" of equipment that can be accessed from key areas in the province.
- Ensure that sufficient funding is provided to allow for barrier-free facilities for students with special needs.

Individualized Program Plans (IPPs)

Suggested Solutions

- Clarify expectations from Alberta Learning for developing IPPs for students who are gifted and talented.
- Involve other service providers early in the development of IPPs and clearly identify roles to ensure an integrated or collaborative approach. The use of the IPP could be formalized to include other professionals engaged to provide specific services.
- Use the IPP as an outcome measure. However, it is possible that for those students with severe difficulties, the definition of success may simply be prevention of further deterioration or maintenance of current functioning. There should be a way of identifying this as success within the IPP rather than expecting even incremental changes.
- Allow teacher assistants to have a larger role in the development of IPPs.
- Programming strategies should be available, provided that they are flexible, evaluated annually and chosen according to the individual needs of the student at the time.
- The educational component requires particular focus in order to enhance the student's individual program plan. More measures of cognitive, behavioural and affective functioning are needed.

- The approach to developing and sustaining a quality process for the IPP needs to be standardized across the province.

Parent Involvement

Suggested Solutions

- Include parents in planning for their children.
- Educators should be able to direct parents to the help they need to understand what is happening in their families. Teachers, administrators, etc. need to embrace the intent of the Children's Services Initiative and allow in other professionals and members of the school community to jointly problem solve. They need to see this as not a diminishing of their expertise, but as an enhancement of it.
- Amend the policy to reflect the need of some students for options to regular classroom placement and remove the implication that these options are less desirable or less appropriate.
- Develop and implement, with community partners, a province-wide and continuing inservice program on inclusive education. This could consist of workshops, seminars, credit and not-for-credit courses, production of instructive materials, purchase of instructive materials, and collaborative teacher and parent groups.
- Provide parents of children with special needs the right to choose an inclusive education.
- A suggested model is where the professional self-evaluates by completing a questionnaire that would subsequently be completed by others, allowing for comparison to be made. In addition to the parents, others completing the questionnaire could include colleagues, associate personnel; e.g., teacher assistants, consultants to the school and administrators. A model such as this ensures better constancy, integrity and reliability.

Gifted and Talented

Suggested Solutions

- Remind and encourage school authorities and administrators that the special needs dollars allocated in the per capita grant includes dollars for gifted and talented testing and programming.
- Move gifted and talented dollars out of the special needs category into a separate category of its own with its own funding.
- Recognize and support the necessity of differentiated programming to achieve academic and personal success.
- Strengthen the application of Alberta Learning policy (identifying the special needs of gifted learners) at the jurisdiction level by requiring increased accountability tied to earmarked funding.
- Review current Alberta Initiative for School Improvement projects to help develop approaches to the education of students who are gifted and talented.

- Monitor jurisdictions to ensure that traditionally under-identified and under-served gifted populations receive equitable access to appropriate programming across the province.
- Address academic needs of students who are gifted and talented through differentiated curriculum with different strategies which include curriculum compacting, acceleration and ability grouping, and which are flexible, evaluated annually and chosen according to individual needs of the student at that time.
- Include opportunities for intellectual peer interaction in social and emotional well-being; e.g., in pull-out groups and congregated settings, and in peer group counselling.

Coordination of Services

Suggested Solutions

- Consider the use of the individualized program plan as the most obvious place for a multi-disciplinary, inter-jurisdictional service overall plan. Service providers could document student needs in the IPP and outline their respective jurisdictions' service plans. The IPP would identify assessed need (services/supports required) and services/supports provided.
- Develop a mechanism to allow student information to be shared among agencies and across jurisdictions.
- Base student outcomes on services/supports actually delivered (rather than an "ultimate" plan).
- Encourage intersectoral recruitment, especially at the classroom level, where the fit between a teacher and a special education focus is important.
- Encourage mental health professionals to see their contributions within a broader context, not only related to individual children.
- Develop provincial protocols for working together in the school environment; create consultative teams.
- Consider having teams made up of parents, members of the community, educators and service providers, who can explain educational programming options to new parents.
- Consider the child's life pathway — what the child needs, and provide it.
- Option of early entry to kindergarten students up to one year younger than the cutoff date.
- Have an overall plan developed for the student and have that plan adopted and accepted by all service providers. Provide funds to ensure that it is carried out. There should not be a need to continually seek resources and identify programs if individuals retain similar conditions. Once the condition is identified, then the only issue should be, "what is required in order to ensure success?" A comprehensive student record needs to be developed which documents the individual

profile and the agreements reached. There may be an opportunity to establish a Ministry of Children Services.
- Develop processes, other than surveys, to study the Student Health Initiative.

Transition Planning

Suggested Solutions

- Accept communication, and gross and fine motor skills as non-associated disabilities in school-age children.
- Explore transitional funding and programming to bridge the short fall incurred when ECS students move into the Grade 1–3 early intervention period.
- Require school jurisdictions and private ECS operators to establish transition planning between ECS and Grade 1 for children with severe disabilities as a requirement for funding.
- Establish a coordinated approach involving other government agencies and departments.
- Provide access to independent community resources to assist in transition planning.
- Develop a comprehensive student record which documents the individual profile, and the services and agreements reached.
- Identify a key person at each school to ensure a transition plan is developed as part of the IPP.

Program Outcomes/Evaluation

Accountability

Suggested Solutions

- Develop standards for identification, development and delivery of programs for students with special needs.
- Monitor school authorities to ensure the above standards are in place and students with special needs are being identified and served.
- Monitor programs and get feedback to improve special education.
- Include parents in the accountability for how resources are allocated and provided to their children.
- Develop jurisdiction models for self-evaluation.
- Develop, implement and evaluate programming on a regular basis by Alberta Learning.
- Provide information to determine the absolute minimum needed to demonstrate accountability and minimize the reporting requirements accordingly.
- Monitor programs rather than approving students for funding.

- Establish an accountability cycle, including: records, plans, intersecting agencies, work with parents, monitoring.
- Increase congruence between policies and expectations of Alberta Learning and the practice of jurisdictions in identifying and meeting the needs of students with special needs.
- Coordinate approaches involving other government agencies and departments.
- Review IPPs, Integrated Occupation Programs (IOPs) and other modified programs regularly to ensure that they are meeting the needs of the individual student.
- Use existing demographical information and earliest detection to better plan for future needs; i.e., from the numbers of professionals to the amount of dollars.
- Develop documents which specify standards for school jurisdictions regarding screening, assessment, early intervention and program development for students with learning disabilities.
- Allocate resources to monitor school jurisdictions to determine the extent to which students with learning disabilities are identified and served.
- Design an audit process to hold school districts accountable for receiving and allocating Severe Disability funds such that the focus of audits is on determining that funds are providing appropriate and effective programs and services.
- Design an audit process for jurisdictions to provide for self-monitoring:
  - Establish a funding approach to soften the transition from Program Unit Funding to Severe Disabilities funding by gradually reducing funding levels to Grade 3 to have funding levels in line from Grade 4 on. This approach would infuse additional funding into the system to enhance the benefits of early intervention.

Appeals and Reviews

Suggested Solutions

- Consider establishing appeal panels at the local and provincial levels to hear and arbitrate disputes. Provide structured follow-up to ensure directives of local and ministerial reviews are implemented.
- Develop procedures for evaluating the effectiveness of the current process and evaluating outcomes.
- Provide additional resources should the decision arising out of a dispute or appeal involve recommendations that require such.
- Set up a balanced appeal board that will fairly hear the concerns from parents and school boards.
- Require a comprehensive review of the appeal process at the local and provincial levels to streamline the process and provide easy and speedy access to and through the process for parents and students.

- Identify expectations and outcomes. What can parents expect? What level of service is provided? All parties must be on the same page. There may be a need to delineate the limits of educational responsibility.
- Consider including people with no connection to the participants in part of the process. Appeals need to be more distant or impartial from education.
- Additional follow-up is needed to ensure ministerial direction is implemented at the school level.

Role of the Special Education Advisory Committee

Suggested Solutions

- Review, clarify and affirm the roles and responsibilities of the Special Education Advisory Committee.